

Insert a macro

- 1 In a template that you're creating or editing, place the cursor where you want to have a macro placeholder. Click **Insert macro**.

Hello|

Save Cancel

- 2 Find and select a macro that you want to use.

← Select macro

insert recipient first name

Auto-fillable fields
Add information to message or appointment body

Insert Recipient First Name
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.

Select Cancel Hide descriptions

- 3 When the macro placeholder appears in the template, save the changes by clicking **Save**.

Hello Insert RecipientFirstName

Save Cancel

💡 If you're going to apply some formatting to macro placeholders and you want that formatting to be visible, switch from the Default macros style to the Dashed one. To do that, go to **Profile > Edit my account**, then select the **Dashed** macros style, and save the changes.

← Edit my account

Username
anna.hope

First name
Anna

Last name
Hope

Email
anna.hope@ablebits.com

Macros style
Dashed

This is an example of a formatted macro placeholder with the Dashed macros style enabled:

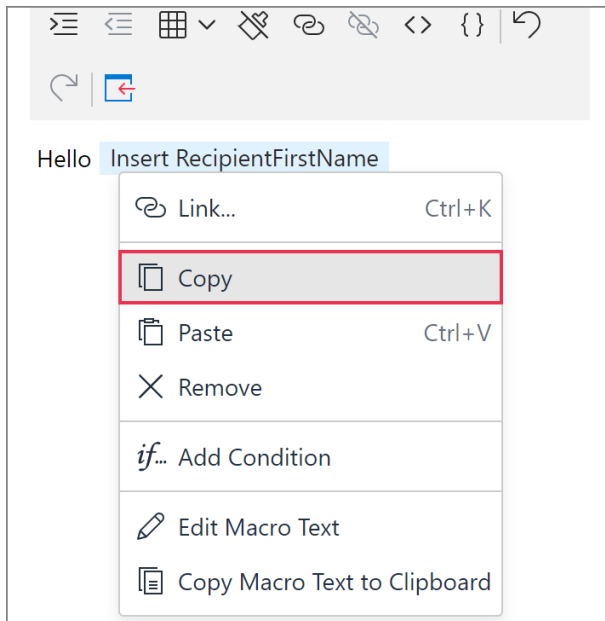
New Template

Hello Insert RecipientFirstName

Save Cancel

Copy a macro

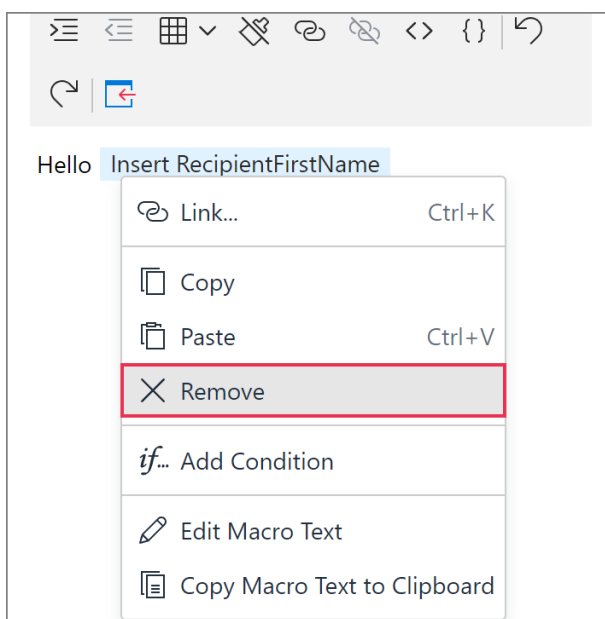
Right-click a macro placeholder and select **Copy**.



You can also copy a macro by selecting the macro placeholder and pressing **Ctrl+C** on your keyboard.

Delete a macro

Right-click a macro placeholder and select **Remove**.

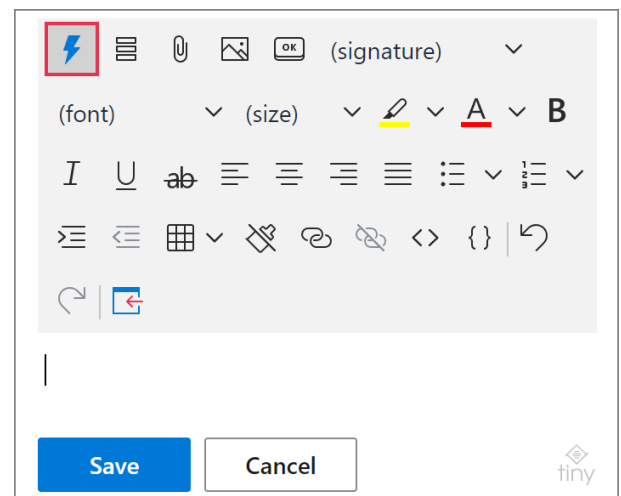


You can also delete a macro by selecting the macro placeholder and pressing the **Delete** or **Backspace** key on your keyboard.

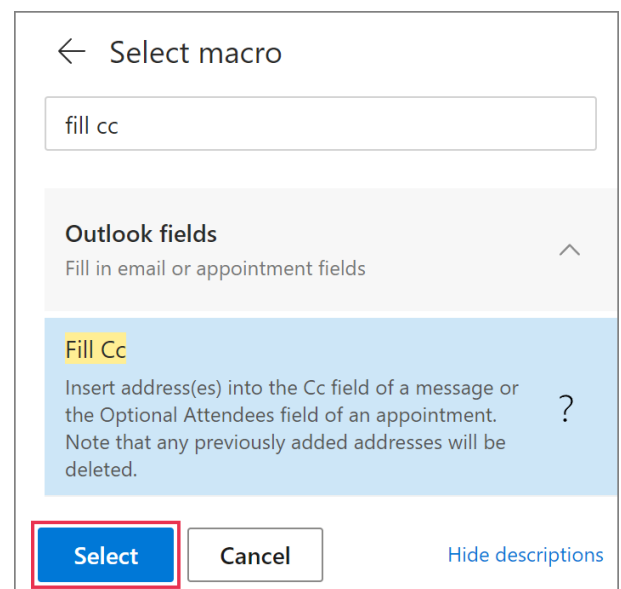
Fill in To, Cc, Bcc, and Subject

To automatically insert some email addresses or text into email message fields, you can use the [Fill](#) and [Add](#) macros. These macros also work for appointments and meetings in Outlook.

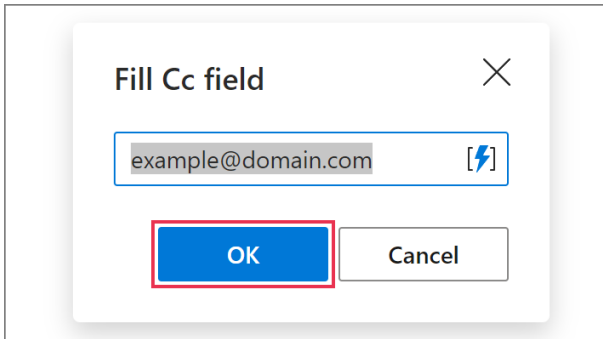
- 1 In a template that you're creating or editing, choose a place for a macro placeholder and put the cursor there. Click **Insert macro**.



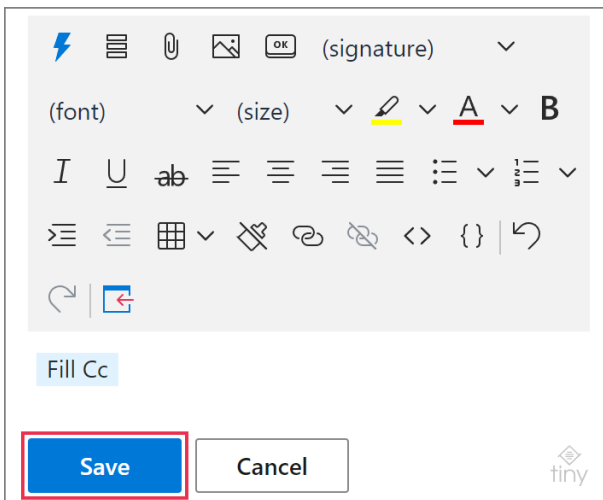
- 2 Select a macro that you want to use.



- 3 In the macro dialog, enter the necessary email address or text. Click **OK**.



- 4 The macro placeholder will appear in your template. Click **Save**.

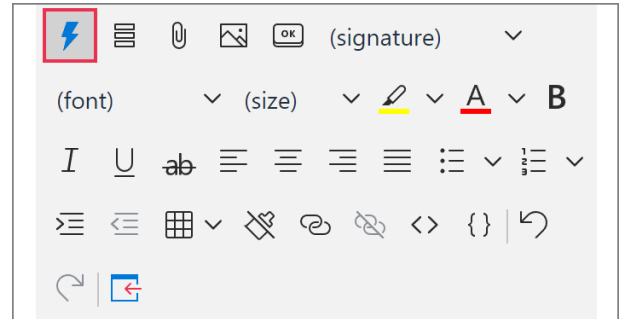


The use of the Fill macro will result in deleting the email addresses or text that the specified field already contains. If you want to keep them, choose the Add macro.

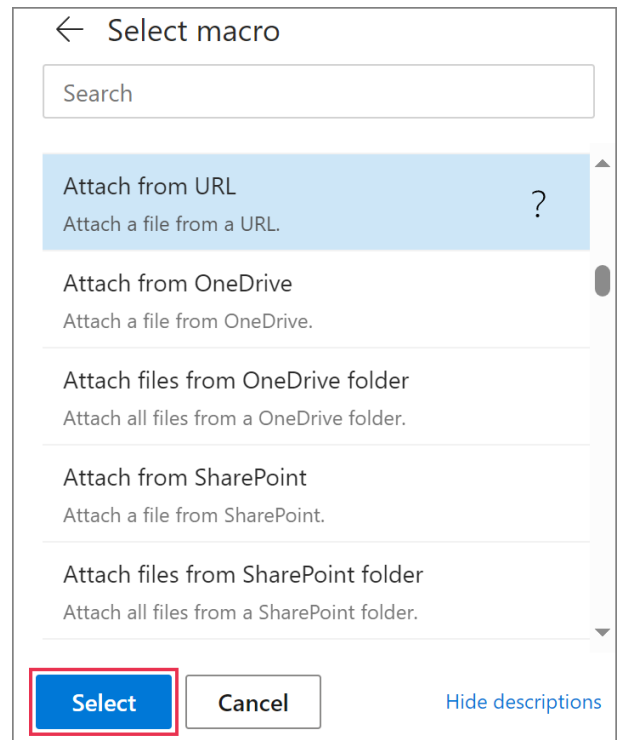
Attach files

You can automatically attach files from OneDrive, SharePoint, or URLs with the [Attach](#) macro.

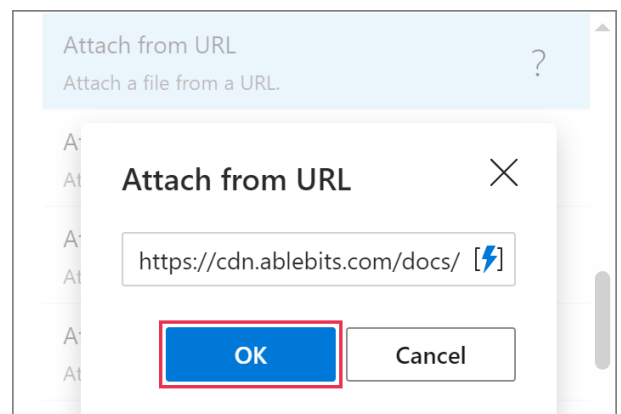
- 1 In a template that you're creating or editing, place the cursor where you want to have the macro placeholder, and then click **Insert macro** on the template editor toolbar.



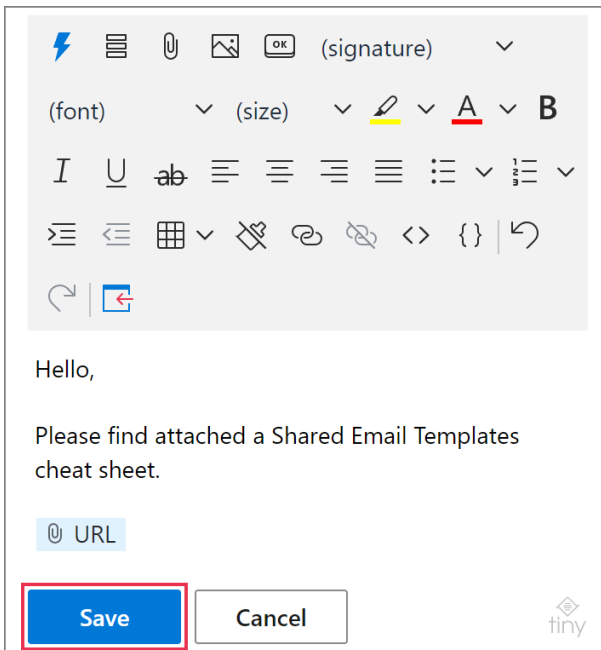
- 2 Select the option you need.



- 3 Using the macro dialog, specify the necessary file(s) or enter a URL.



- 4 The macro placeholder will be added to the template. Click **Save**.



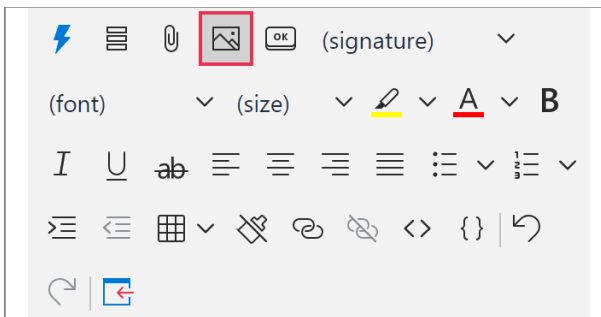
Learn more

- How to attach files to your templates
ablebits.com/docs/outlook-shared-templates-attach-files

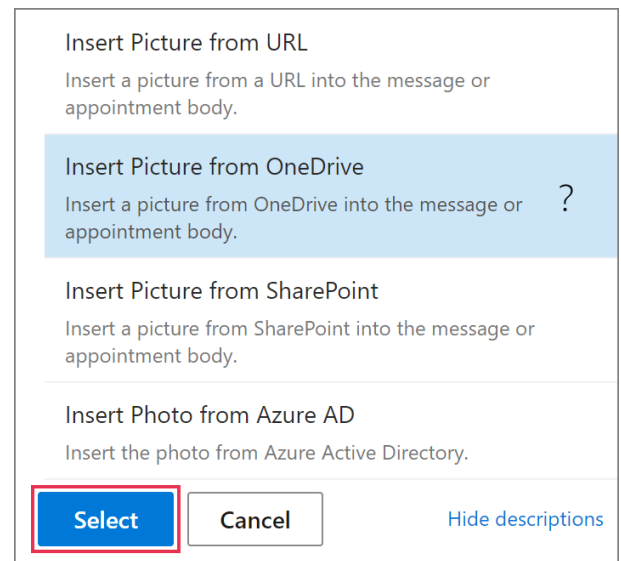
Insert pictures

By using the [InsertPicture](#) macro, you can add images from OneDrive, SharePoint, and URLs. You can also insert your profile picture from Azure AD.

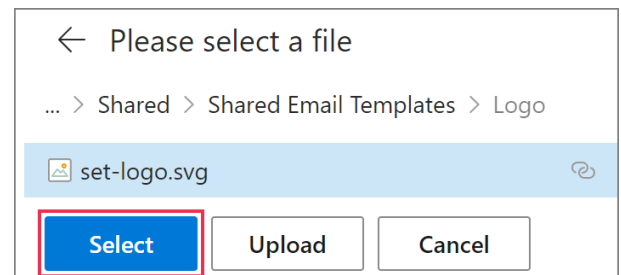
- 1 In a template that you're creating or editing, place the cursor where the macro placeholder is needed. Then click **Insert picture**.



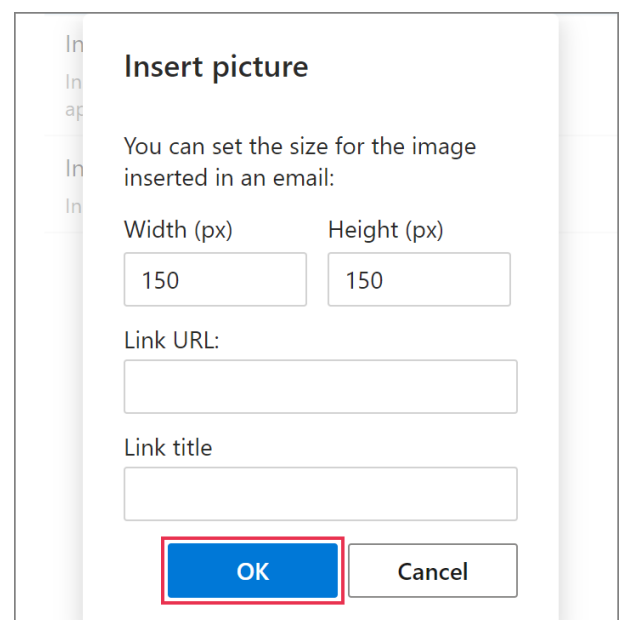
- 2 Select the option that you want to use.



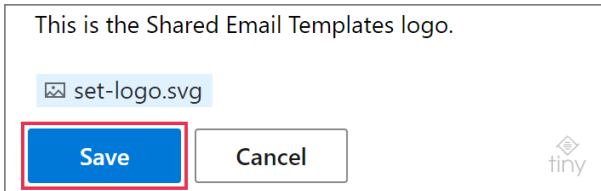
- 3 Specify where to take the picture from.



- 4 Set the picture size, add a link, and enter the link title if you want to.



- 5 When the macro placeholder is added to the template, click **Save**.



Learn more

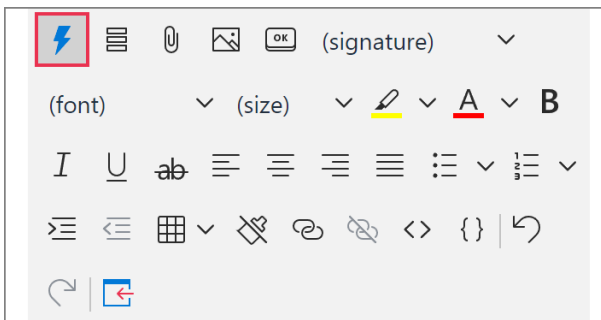
- How to insert pictures into templates
ablebits.com/docs/outlook-shared-templates-insert-pictures

Insert data into the message body with auto-fillable fields

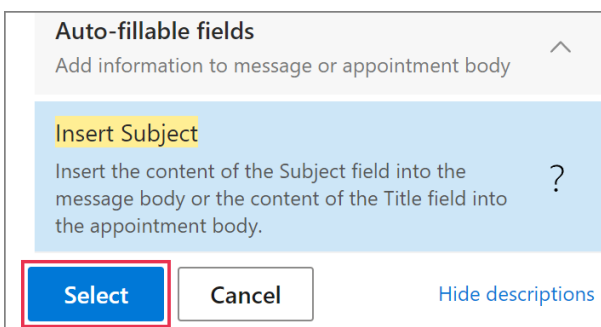
Insert the subject line content

To automatically add the content of the subject line to the message body, use the [Insert](#) macro.

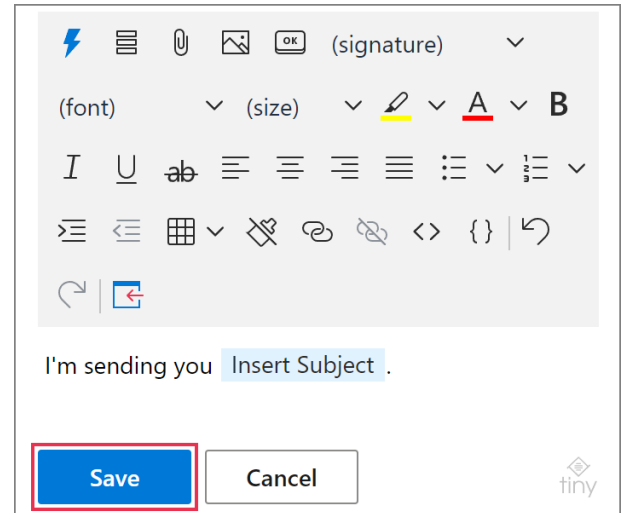
- 1 In the **Edit** mode, click **Insert macro**.



- 2 Select **Insert Subject**.



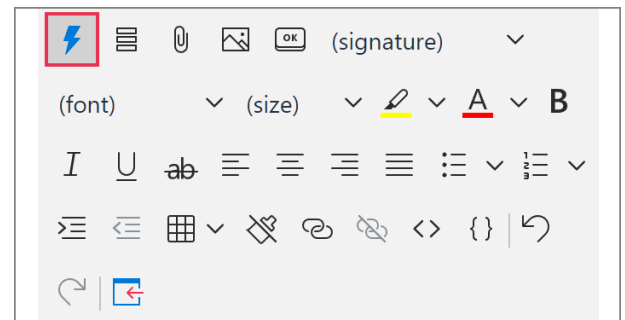
- 3 The macro placeholder will indicate an auto-fillable field in your template. Click **Save**.



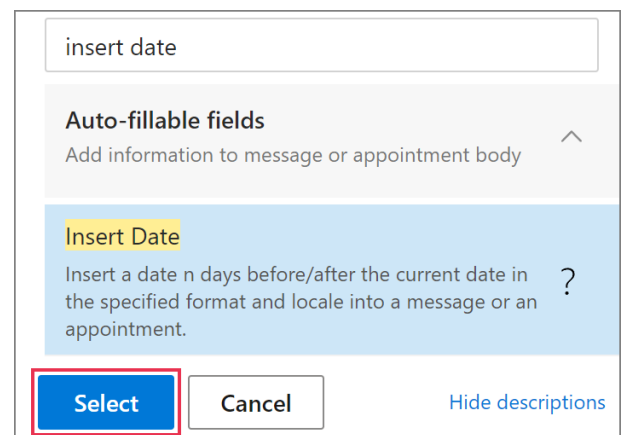
Insert the current date

Use the [Insert](#) macro to get the current date automatically added to the message body.

- 1 In the **Edit** mode, click **Insert macro**.



- 2 Select **Insert Date**.



- 3 Check the date format and change it if you want to. Click **OK**.

Date format

Date format
m d, yyyy

Language tag (locale)
(default)

Days before/after current date
0

OK Cancel

You can get a certain number of days automatically subtracted or added by entering the necessary value under **Days before/after current date**.

- 4 The macro placeholder indicating an auto-fillable field is in the template now. Click **Save**.

⚡ (font) (size) (signature) I U ab (text alignment) (list) (table) (link) (unlink) (code) (html) (undo) (redo)

This is just a quick note to remind you that the deadline is today, Insert Date .

Save Cancel

Insert the current time

You can automatically insert the current time into the message body by using the [Insert](#) macro in your template.

- 1 On the template editor toolbar, click **Insert macro**.

⚡ (font) (size) (signature) I U ab (text alignment) (list) (table) (link) (unlink) (code) (html) (undo) (redo)

- 2 Select **Insert Time**.

← Select macro

insert time

Auto-fillable fields
Add information to message or appointment body

Insert Time
Insert the current time or the time n minutes before/after the current time into a message or an appointment.

Select Cancel Hide descriptions

- 3 Check the time format to change it if needed. Click **OK**.


Time format

Time format
(default)

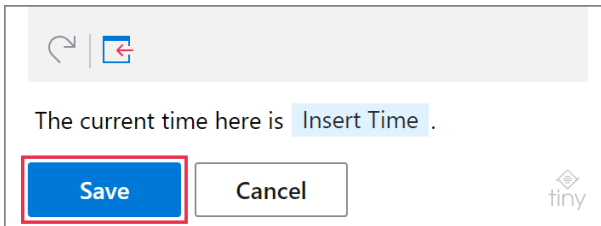
Language tag (locale)
(default)

Minutes before/after current time
0

OK Cancel

 You can get a certain number of minutes automatically subtracted or added by entering the necessary value under **Minutes before/after current time**.

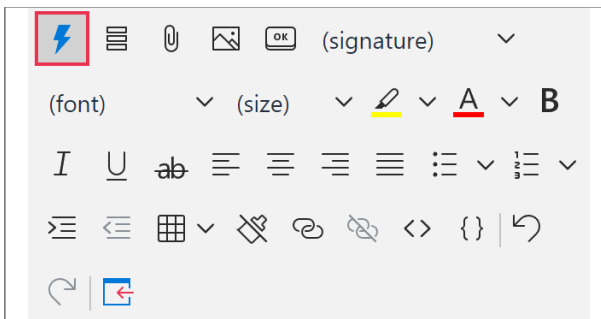
- 4 The macro placeholder indicates an auto-fillable field in your template. Click **Save**.



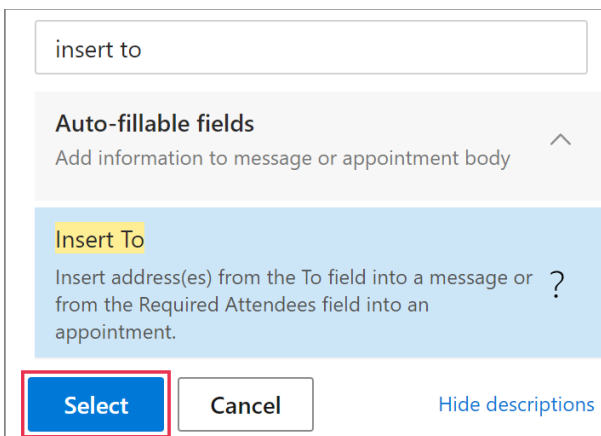
Insert email addresses from To, Cc, and Bcc

With the [Insert](#) macro in your templates, you can add the content of the To, Cc, and Bcc fields to the message body.

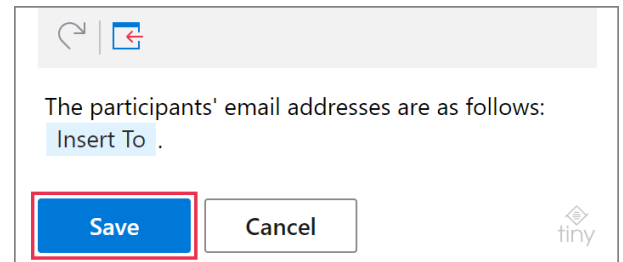
- 1 On the template editor toolbar, click **Insert macro**.



- 2 Select the option you need.



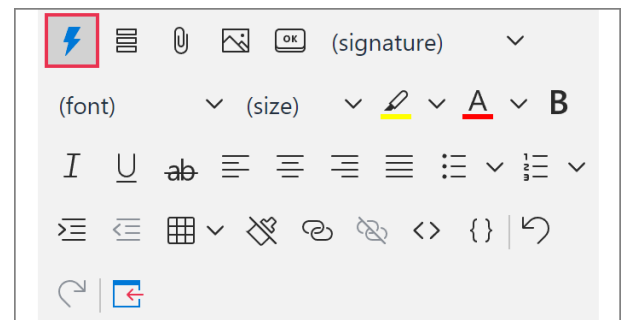
- 3 The macro placeholder will indicate an auto-fillable field. Click **Save**.



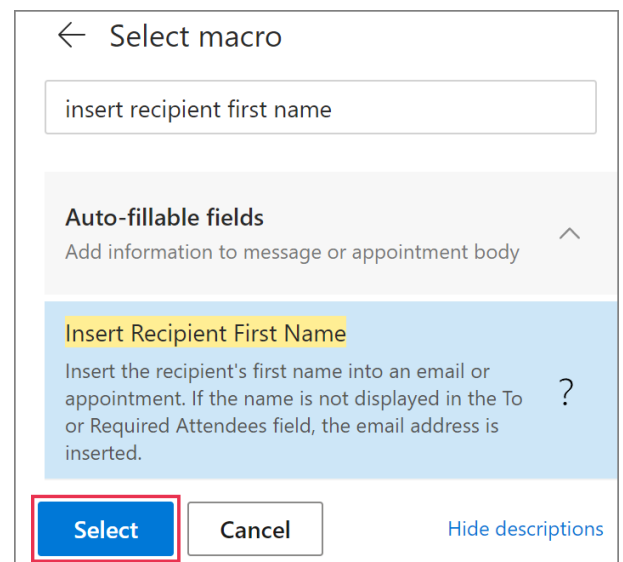
Insert the recipient and sender names

The [Insert](#) macro can return the name of the sender as well as the name of a person whom the email is sent to so that the necessary name can be automatically added to the message body.

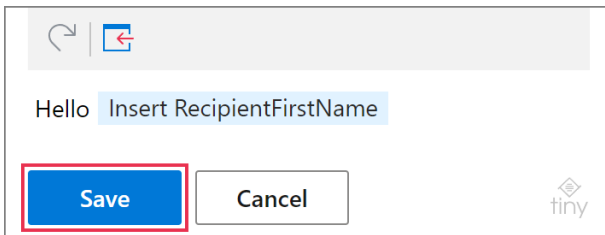
- 1 On the template editor toolbar, click **Insert macro**.



- 2 Select the option that you'd like to use.



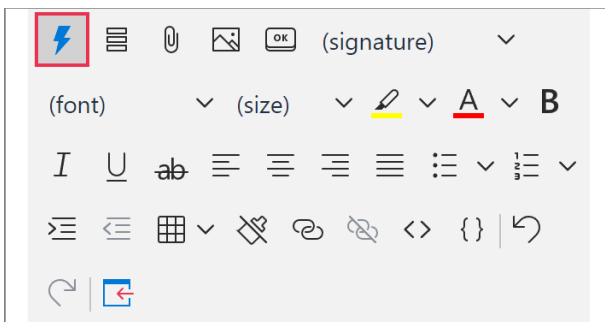
- The macro placeholder indicates an auto-fillable field. Click **Save**.



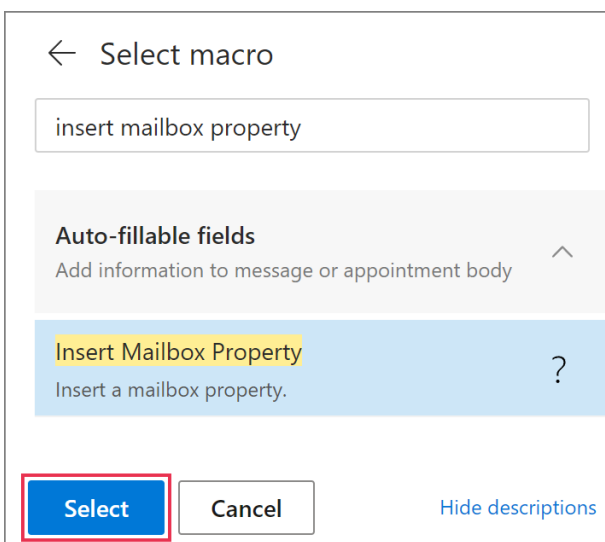
Insert mailbox, profile, team, and Azure AD properties

By using the [Insert](#) macro in a template, you can add mailbox, profile, team, and Azure AD properties to the message body.

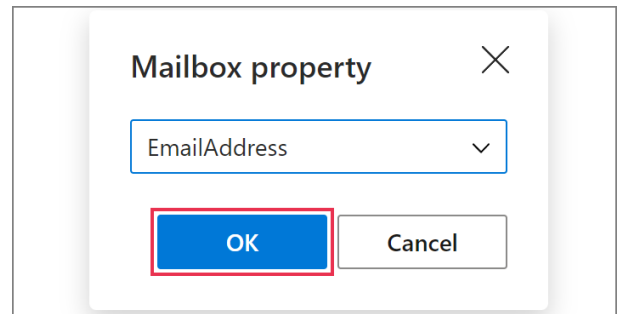
- In the **Edit** mode, click **Insert macro** on the template editor toolbar.



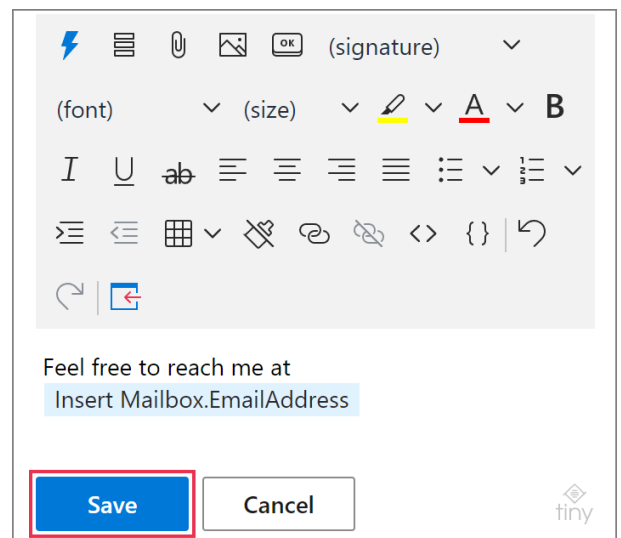
- Select the option that you want to use in your template.



- Select the necessary property and click **OK**.



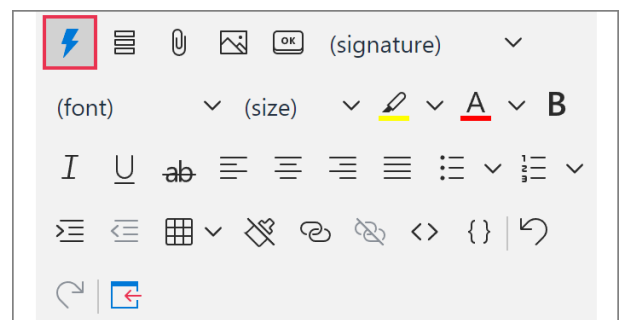
- The macro placeholder indicating an auto-fillable field will appear. Click **Save**.



Insert values from datasets

To insert a value from a dataset into the message body, use the [Insert](#) macro in your templates.

- When creating a new template or editing an existing one, click **Insert macro**.



2 Select **Insert Dataset Value**.

← Select macro

insert dataset value

Auto-fillable fields
Add information to message or appointment body

Insert Dataset Value
Insert a value from a dataset. ?

Select Cancel Hide descriptions

3 Select a **dataset**, a **column** containing the value you need, and a **key value** indicating a row from where the value is to be returned. Click **OK**.

Dataset value

Select dataset
09 Sample dataset

Select column
URL

Key value
Ablebits

OK Cancel

4 The macro placeholder indicating an auto-fillable field will be added to the template. Click **Save**.

←

To learn more, visit the website:
09 Sample dataset.URL

Save Cancel

Learn more

- How to create and edit datasets
ablebits.com/docs/outlook-shared-templates-datasets

Enter or select data via dialogs— interactive fillable fields

If you need an interactive dialog prompting you to enter or select some data when you insert a template into an email message, create an interactive fillable field with the [WhatToEnter](#) macro.

You can use any of the five options the macro has: Text field, Dropdown list, Date, Time, and Dataset.

1 When creating or editing a template, select a place for the macro placeholder, and then click **Insert macro**.

← Select macro

what to enter

Interactive fillable fields
Create interactive fillable fields

What to Enter
Create an interactive fillable field for a text value, a dropdown list, a date or time picker etc. ?

Select Cancel Hide descriptions

2 Select **What to Enter**.

← Select macro

what to enter

Interactive fillable fields
Create interactive fillable fields

What to Enter
Create an interactive fillable field for a text value, a dropdown list, a date or time picker etc. ?

Select Cancel Hide descriptions

- 3 Select a WhatToEnter macro option and specify the details required for creating an interactive fillable field. Then click **OK**.

- 4 The macro placeholder indicating an interactive fillable field will appear in your template. Click **Save**.

Learn more

- How to add interactive fillable fields
ablebits.com/docs/outlook-shared-templates-macros-whattoenter

Clear the message body

You can delete the content of the message body by using the [Clear](#) macro in your template.

- 1 In the **Edit** mode, click **Insert macro**.

- 2 Select **Clear**.

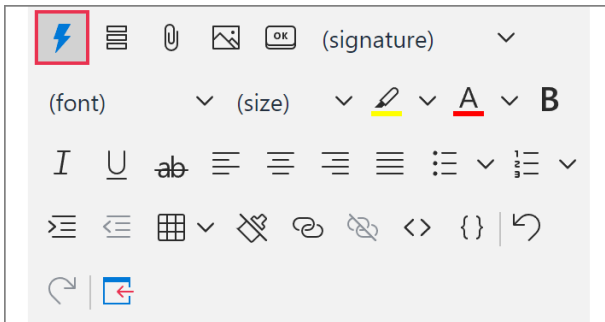
- 3 Select **body**, and then click **OK**.

You can also use the Clear macro for the To, Cc, Bcc, and Subject fields.

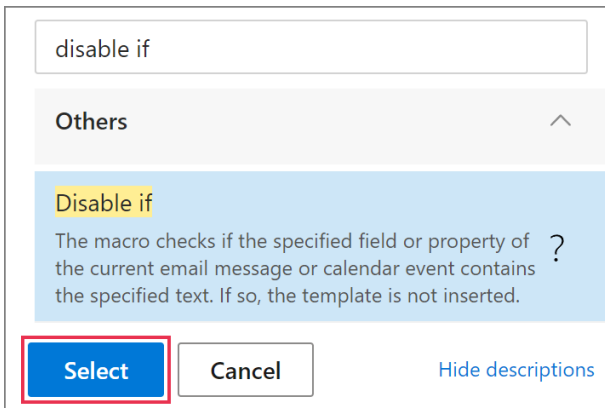
Disable inserting a template

Set a condition with [DisableIf](#), and your template won't be inserted if the condition is met.

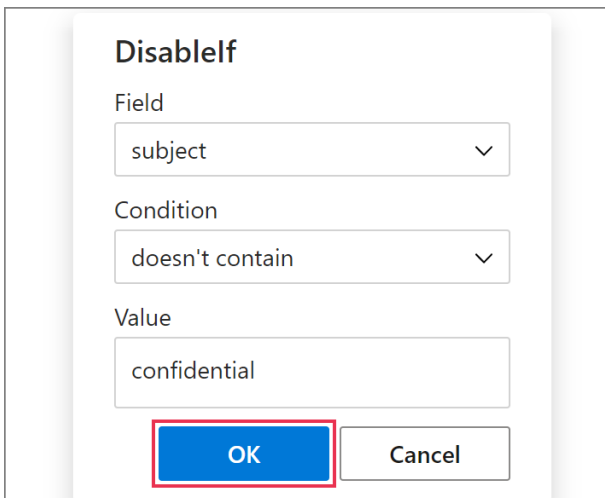
- 1 When creating or editing a template, click **Insert macro**.



- 2 Select **Disable if**.



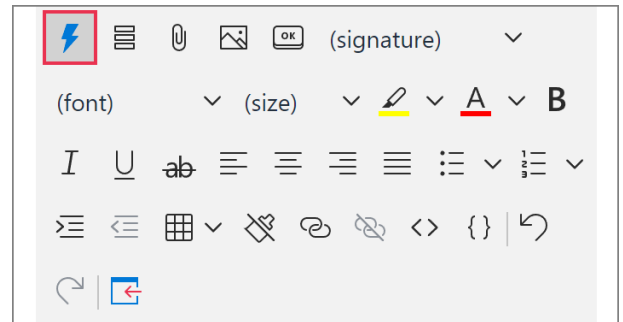
- 3 Specify your condition, and then click **OK**.



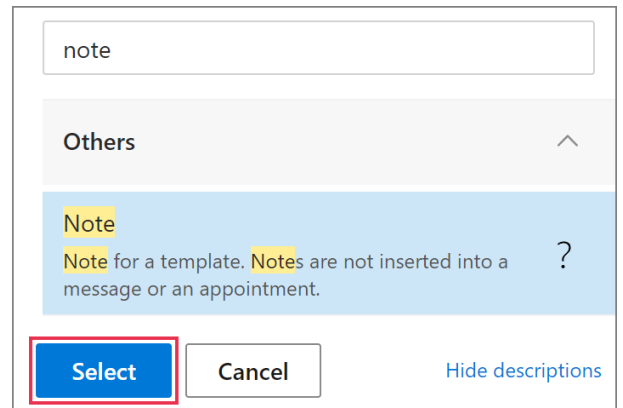
Add notes

Use the [Note](#) macro to make a note that won't be added to an email message.

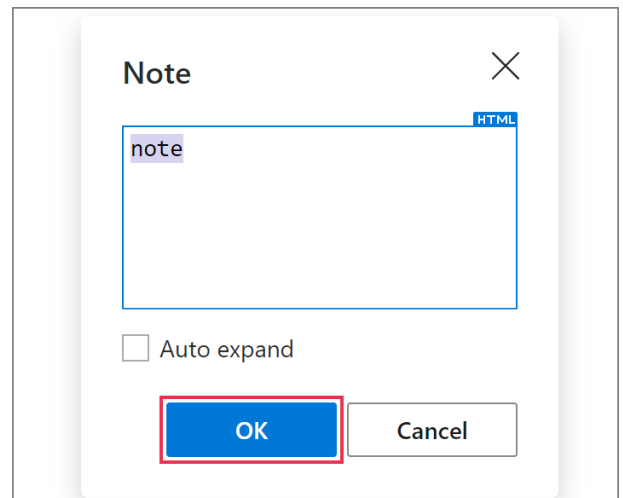
- 1 On the template editor toolbar, click **Insert macro**.



- 2 Select **Note**.



- 3 Enter your note and click **OK**.



Select **Auto expand** if you want a note to open automatically.

note

☒ Auto expand

OK Cancel

Nest a macro

To make two macros work together, you need to nest one of them within the other.

1 In the **Edit** mode, click **Insert macro**.

Insert macro

2 Select a macro.

Select macro

add to subject

Outlook fields
Fill in email or appointment fields

Add to Subject
Add info to the Subject field of a message or the Title field of an appointment keeping the current information.

Select Cancel Hide descriptions

3 In the macro dialog, click the **Insert nested macro** icon.

Add to Subject line

Text

☐ Before

OK Cancel

4 Select the macro that will be a nested one.

insert recipient first name

Auto-fillable fields
Add information to message or appointment body

Insert Recipient First Name
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.

Select Cancel Hide descriptions

5 Click **OK**.

Add to Subject line

~%Insert{"field": "recipient_first" [lightning bolt]

☒ Before

OK Cancel

You can use nested macros as long as they do not exceed one nested level.

Get the most out of macros

- Use macros in templates
ablebits.com/docs/outlook-shared-templates-macros
- Complete list of macros
ablebits.com/docs/outlook-shared-templates-complete-list-macros
- Nested macros
ablebits.com/docs/outlook-shared-templates-macros/#nested-macros



Need more details?

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

