### Insert a macro

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

<b>f</b> =	0 🖂 📧 (signature) 🗸 🗸
(font)	$\vee$ (size) $\vee$ $\swarrow$ $\vee$ <b>A</b> $\vee$ <b>B</b>
$I \ \sqcup$	⊕ ≡ ≡ ≡ ≡ ≈ ≌ × ≌ ×
∑ ⊂	≣ < ⅔ © ゑ <> {}   ᠫ
<□   €	
Hello	
Save	Cancel 🔅

Find and select a macro that you want to use.

$\leftarrow$ Select macro	
insert recipient first name	
Auto-fillable fields Add information to message or appointmen	t body
Insert Recipient First Name Insert the recipient's first name into an emai appointment. If the name is not displayed in or Required Attendees field, the email addre inserted.	the To ?
Select Cancel H	ide descriptions

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

Hello Insert R	ecipientFirstName	
Save	Cancel	چە tiny

♀ 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.

$\leftarrow$ Edit my account	
Username	
anna.hope	
First name	
Anna	
Last name	
Норе	
Email	
anna.hope@ablebits.com	
Macros style	
Dashed	$\sim$

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

New	Temp	late						
۶		U		ОК	(signa	ture)	~	
(fon	it)		✓ (s	ize)	~ 4	/ ~	<u>A</u> ~	В
Ι	<u>U</u>	ab	≣	Ξ	= =	≣ ☷	∨ ≟	~
≥≣	$\overline{\leq}$		~ ~	× 4	r B	<>	{}   \	)
C	÷							
Hello	Inser	rt Rec	ipien	tFirstl	Vame			
9	Save		С	ancel				(inv

## Copy a macro

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

) 前 画 * 炎 の 必 <> {} し 、 、 、 、 、 、 、 、 、 、 、 、 、
Hello       Insert RecipientFirstName         Image: Link       Ctrl+K         Image: Copy       Image: Copy         Image: Copy       Image: Copy         Image: Copy       Image: Ctrl+V         X       Remove         Image: Image: Image: Ctrl+V       X         X       Remove         Image: Image: Image: Image: Ctrl+V       X         X       Remove         Image: I

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 <u>Fill</u> and <u>Add</u> 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.

← Select macro	
fill cc	
<b>Outlook fields</b> Fill in email or appointment fields	^
Fill Cc Insert address(es) into the Cc field of the Optional Attendees field of an ap Note that any previously added addr deleted.	ppointment. ?
Select Cancel	Hide descriptions

**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 <u>Attach</u> macro.

 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.

$\leftarrow$ Select macro		
Search		
Attach from URL Attach a file from a URL.	?	
Attach from OneDrive Attach a file from OneDrive.		
Attach files from OneDrive folder Attach all files from a OneDrive folder.		
Attach from SharePoint Attach a file from SharePoint.		
Attach files from SharePoint folder Attach all files from a SharePoint folder.		•
Select Cancel	Hide description	าร

**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
 <u>ablebits.com/docs/outlook-shared-templates-</u>
 <u>attach-files</u>

# **Insert pictures**

By using the <u>InsertPicture</u> 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.

$\leftarrow$ Please	select a file	
$>$ Shared $>$ Shared Email Templates $>$ Logo		
🛋 set-logo.svg	J	େ
Select	Upload	Cancel

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

ln In ap	Insert picture	
In	You can set the si inserted in an em	
In	Width (px)	Height (px)
	150	150
	Link URL:	
	Link title	
	ОК	Cancel

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

This is the Sha	red Email Templates logo.	
🖾 set-logo.sv	g	
Save	Cancel	(⊜) tiny

### Learn more

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

# 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 <u>Insert</u> macro.

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



2 Select Insert Subject.



**3** The macro placeholder will indicate an autofillable field in your template. Click **Save**.



### Insert the current date

Use the <u>Insert</u> 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		
mmmm d, yyyy	$\sim$	
Language tag (locale)		
(default)	$\sim$	
Days before/after current	date	
0		
ОК	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 autofillable field is in the template now. Click **Save**.



## Insert the current time

You can automatically insert the current time into the message body by using the <u>Insert</u> macro in your template.

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



2 Select Insert Time.

$\leftarrow$ 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)	$\sim$
Language tag (locale	)
(default)	$\sim$
Minutes before/after	current time
0	
ок	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 autofillable field in your template. Click **Save**.



### Insert email addresses from To, Cc, and Bcc

With the <u>Insert</u> 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 autofillable field. Click **Save**.

The participant Insert To	ts' email addres	ses are as follows:
Save	Cancel	tiny

#### Insert the recipient and sender names

The <u>Insert</u> 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.

$\leftarrow$ Select macro		
insert recipient first name		
<b>Auto-fillable fields</b> 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 descri	ptions	

**3** The macro placeholder indicates an autofillable field. Click **Save**.



# Insert mailbox, profile, team, and Azure AD properties

By using the <u>Insert</u> macro in a template, you can add mailbox, profile, team, and Azure AD properties to the message body.

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



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

$\leftarrow$ Select macro	
insert mailbox property	
Auto-fillable fields Add information to message or appointment body	^
Insert Mailbox Property Insert a mailbox property.	?
Select Cancel Hide des	scriptions

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

Mailbox property	×
EmailAddress	~
ОК	Cancel

**4** The macro placeholder indicating an autofillable field will appear. Click **Save**.



### Insert values from datasets

To insert a value from a dataset into the message body, use the <u>Insert</u> macro in your templates.

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



2 Select Insert Dataset Value.



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	$\sim$
Select column	
URL	$\sim$
Key value	
Ablebits	$\sim$
ОК	Cancel

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



### Learn more

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

# 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, create an interactive fillable field with the <u>WhatToEnter</u> 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**.



#### 2 Select What to Enter.

$\leftarrow$ Select	macro	
what to ente	r	
Interactive fi Create interact	<b>llable fields</b> ive 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

Г

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

What to enter	
Dropdown list	$\checkmark$
Field name	
Percentage	[ <b>*</b> ]
ltems 10% 20% 30%	HTML
User can edit select User can select mu separated by	
<ul> <li>For Insert-if sectio</li> <li>Required</li> </ul>	ns only 🛈
ОК	Cancel

 $\bigcirc$  If you see the HTML icon above a text-entry box in a macro dialog, it means that you can enter a piece of HTML code.

	HTML
<b>Some text</b>	

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



# Clear the message body

You can delete the content of the message body by using the <u>Clear</u> macro in your template.

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

<b>F</b> =	0 🖾 🖭 (signature) 🗸 🗸
(font)	$\vee$ (size) $\vee \swarrow \vee \underline{A} \vee \underline{B}$
I U	ab ≡ ≡ ≡ ≡ ≈ ½ ×
≥ ≧	⊞ × ⅔ © ∞ <> {}   ℃
<□   ►	

2 Select Clear.

← Select macro	
clear	
Others	^
<mark>Clear</mark> This macro <mark>clear</mark> s the specified field of the c email message or calendar event.	urrent ?
Select Cancel	lide descriptions

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

Clear	
Field	
body	$\sim$
ОК	Cancel

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

# Disable inserting a template

Set a condition with <u>Disablelf</u>, 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.

disable if		
Others		^
the current e	necks if the specified f mail message or caler text. If so, the templa	ndar event contains
Select	Cancel	Hide descriptions

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

Disablelf	
Field	
subject	$\sim$
Condition	
doesn't contain	$\sim$
Value	
confidential	
ОК	Cancel

# Add notes

Use the <u>Note</u> 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.

note			
Others			^
<mark>Note</mark> Note for a template. <mark>Note</mark> s are not inserted into a message or an appointment.			?
Select	Cancel	Hide desc	riptions

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

Note		
note		
Auto expand		
ОК	Cancel	

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

not	:e	HTML	
<b>,</b>	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**.



2 Select a macro.

← Select macro		
add to subject		
<b>Outlook fields</b> 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	Hide descriptions	

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

Text [1]	
Before	
OK Cancel	

**4** Select the macro that will be a nested one.

insert recip	ient first name		
Auto-fillab Add informat	<b>le fields</b> iion to message or ap	pointment 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 descri	iptions

5 Click OK.



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
   <u>ablebits.com/docs/outlook-shared-templates-complete-list-macros</u>
- Nested macros <u>ablebits.com/docs/outlook-shared-templates-macros/#nested-macros</u>

# 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 <u>ablebits.com/docs/outlook-shared-templates-tips-tricks</u>
- All Shared Email Templates cheat sheets ablebits.com/docs/outlook-shared-templates-cheat-sheets

