Customer Care and Engagement:

Intermediate Module

silverbear

GUIDE PURPOSE AND USAGE

GUIDE PURPOSE

To describe and explain ways in which the Silverbear CRM can be used to manage customer service activities.

PREREQUISITE GUIDES/COURSES	RECOMMENDED PRIOR GUIDES/COURSE	RECOMMENDED FOLLOW UP COURSE(S)
Fundamentals: Introductory Module Contacts and Organisations: Introductory Module Customer Care and Engagement: Intermediate Module		Fundamentals and Administration: Intermediate module

- Please note that the screens and layouts on your Silverbear environment are dependent on your organisation's unique configuration and business requirements, and each individual's access and security settings. Therefore, some of the screenshots and menu options you see will not exactly match up with those on your own screens. Your company may also have specific development and customised usage of certain records and functions (for example, Contact Types), please refer to your own internal documentation or training where there is a discrepancy

VERSION HISTORY

Version	Date	Author	Change Details
1.0	JUNE 2021	SUSANNAH PATRICK	CREATED

VIDEO CONTENT

Video content coming soon

- Feedback – please email susannah.patrick@silverbear.com

CUSTOMER CARE AND ENGAGEMENT – INTERMEDIATE MODULE

1. Introduction

- The purpose of this guide is to help you manage customer care and interactions through your CRM.
- It will include:
  - Queries and Cases
  - Queues
  - The Comms Batch tool
  - Email Tracking
  - Email Templates
  - Mail merge for single records

- Your Silverbear CRM and portal configuration is likely to include many automated communications. Advice on changing or creating automatic emails or other automated customer care activity is out of the scope of this guide but is provided on our Blended Development training; please talk to the Silverbear training team for more details.
- Creating mailing lists for use in bulk communication apps such as Dot Mailer is covered in the Marketing Module

2. Cases and Enquiries (Cases)

2.1. Introduction

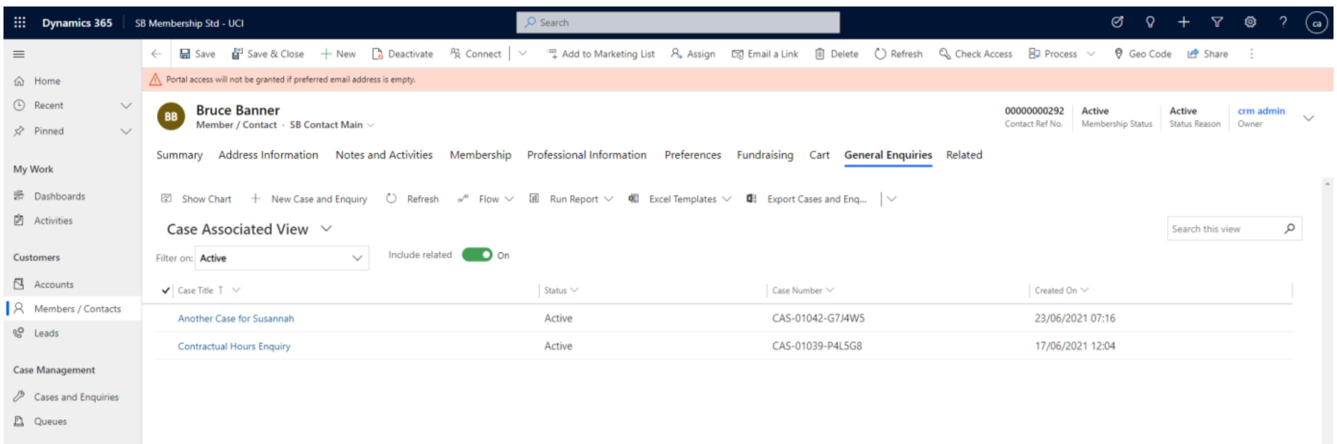
- Cases are used to manage customer requests or issues. For a simple request such as an enquiry about a payment you may feel that activities (for eample storying a phone call) meet your needs.
- However for anything more complex, Cases are ideal. They allow much more information to be recorded, are highly customisable and can have built in workflows guiding your team trhough the essential tasks.
- This entity (record type) may be labelled Cases or Cases and Enquiries or similar in your environment. For the purposes of this guide, they will be referred to as Cases.
- Cases can originate from a client completing a portal form, or from your team members' manually creating a record on CRM. If configuration is in place, they may even be created as a result of a particular inbox being emailed. They are often used with queues and dashboards to ensure that they are being dealt with in a timely manner and by the right people.

2.2. Notes on customisation

- The Case entity is one which is often customised for Silverbear clients, in particular through the use of Business Process Flows (the section on the top of the screen which guides you through steps to take).
- Often these Business Process Flows are customised so that they change depending on certain criteria, in particular the choice of Case Type to ensure that the correct action is taken to resolve each type of issue.
- Because of this, the screens you see in this guide and the steps described may be different than your Silverbear CRM, however the basic principles should remain the same.

2.3. Accessing Cases

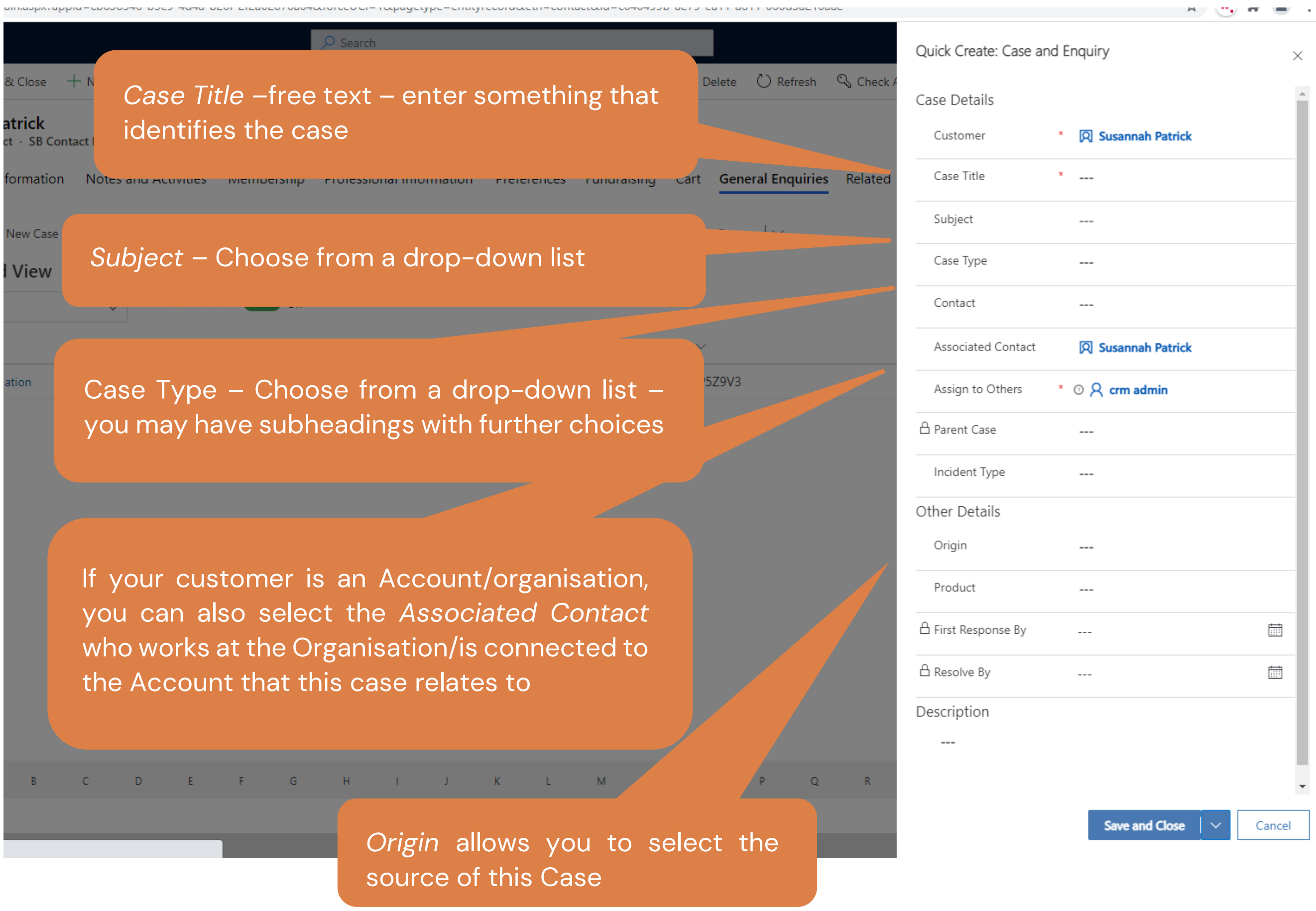
- Cases can be accessed from a Contact or Account. Your record may include a Cases tab, if not they can be accessed by choosing *Related* and then *Cases* (this also may be listed as *General Enquires* or *Cases and Enquiries*)
- You will then see any Cases connected to this customer, and from here you can click through the records to view them in more detail, or create new Cases by clicking on the *+New Case and Enquiry* option (see below)



- Cases can also be accessed from the *Cases and Enquiries* menu option – usually held in the Service or *Case & Complaint Management* Work Area. As in other areas of Silverbear, you will be able to change the view, filter, sort and search as required. Please see the Fundamentals and Administration : Intermediate Guide for more information on using views

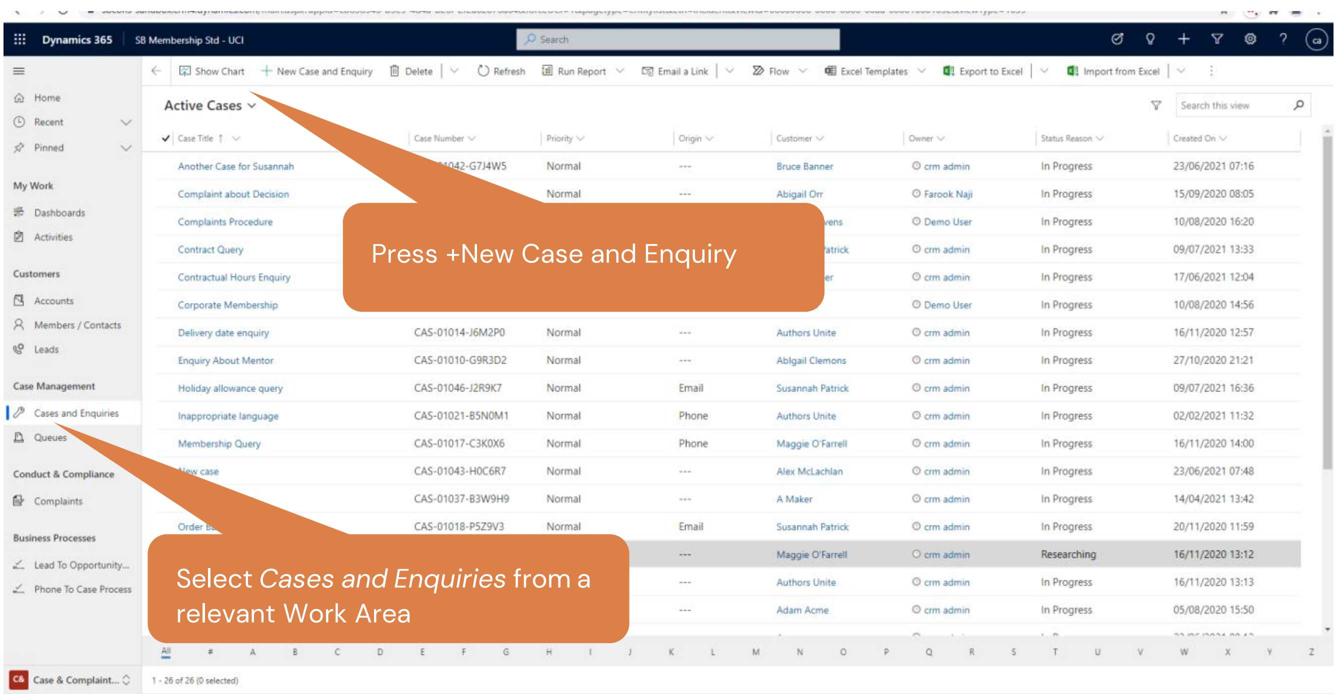
2.4. Creating Cases using the Quick Create form

- Cases can be created by clicking the quick create button (+) on the top bar, or by choosing the *+New Case and Enquiry* option when looking at Related-Cases (or Related – General Enquiries) when viewing a Contact or Account
- Typically, the form will appear as below, although your version may have customised fields
- Enter the required fields. Some key fields are flagged below
- Press Save & Close


Case Title –free text – enter something that identifies the case
Subject – Choose from a drop-down list
Case Type – Choose from a drop-down list – you may have subheadings with further choices
If your customer is an Account/organisation, you can also select the *Associated Contact* who works at the Organisation/is connected to the Account that this case relates to
Origin allows you to select the source of this Case
Quick Create: Case and Enquiry
Case Details
Customer
Susannah Patrick
Case Title
Subject
Case Type
Contact
Associated Contact
Susannah Patrick
Assign to Others
crm admin
Parent Case
Incident Type
Other Details
Origin
Product
First Response By
Resolve By
Description
Save and Close
Cancel

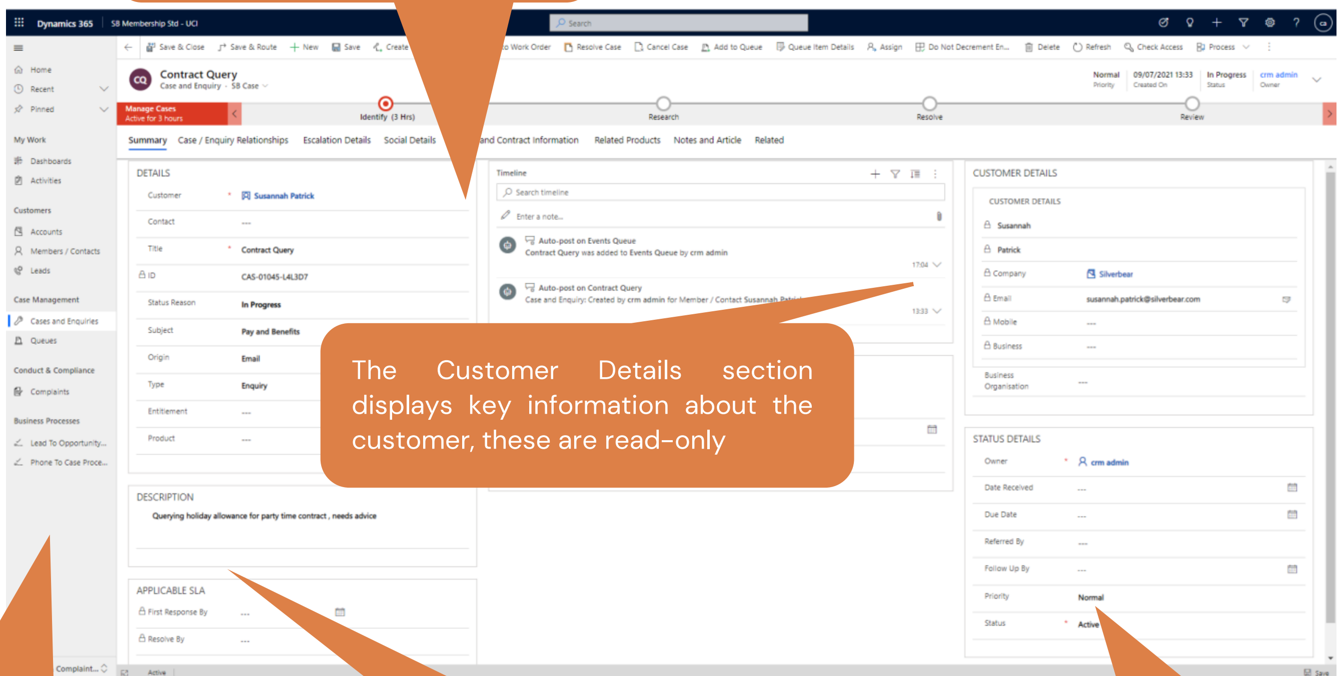
2.5. Creating Cases using the full Case form

- Navigate to *Cases and Enquiries* and press *+New Case and Enquiry* on the Command Bar



- The full Case form will be displayed
- Enter the key information in the *Details* section – (please see the Quick Create form above)
- Press *Save* and further functionality such as the Timeline will become available
- A typical layout follows, including some key sections which are normally included

Use the *Timeline* to record interactions and activities carried out to manage/resolve this case



The Customer Details section displays key information about the customer, these are read-only

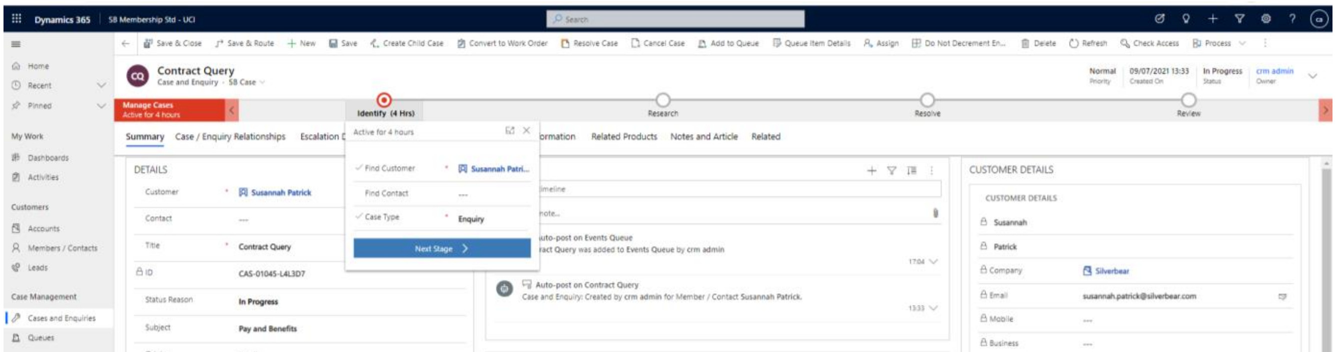
Description is a free text explanation about the Case

Service Level Agreement (SLA) info is usually pre-populated if these have been configured in your environment

Status Details allows you to record key dates and events for this case and to set a priority

2.6. The Business Process Flow

The Business Process Flow is the section on the top of the form which takes you through different stages needed to resolve or complete the case. This is often configured specifically for Silverbear clients and often different Business Process Flows are created which are triggered by specific data or events, such as a particular Case Type being chosen. The purpose of a BPF is to help standardise processes

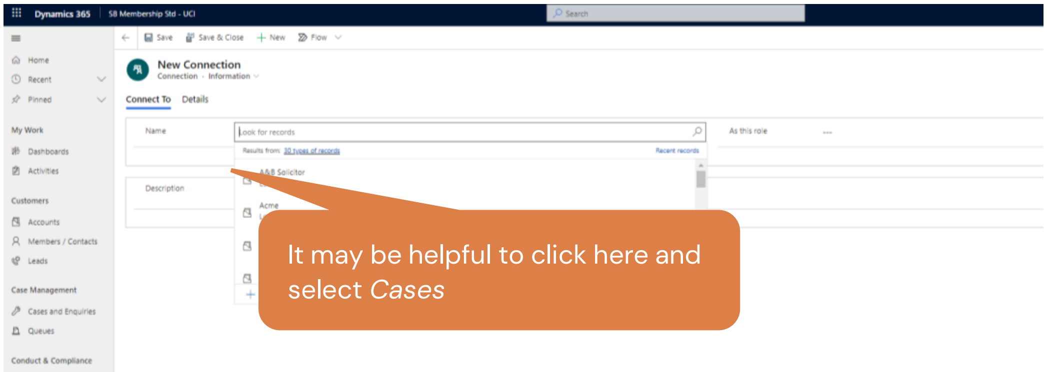


- The Target (red circle) will show the current stage, and each section would normally include a number of fields to complete, or checks to make
- Press *Next Stage* to move the process on
- Please note that your organisation may also require you to carry out other work within the record, it should not be assumed that the process flow contains all the required activity needed for a Case

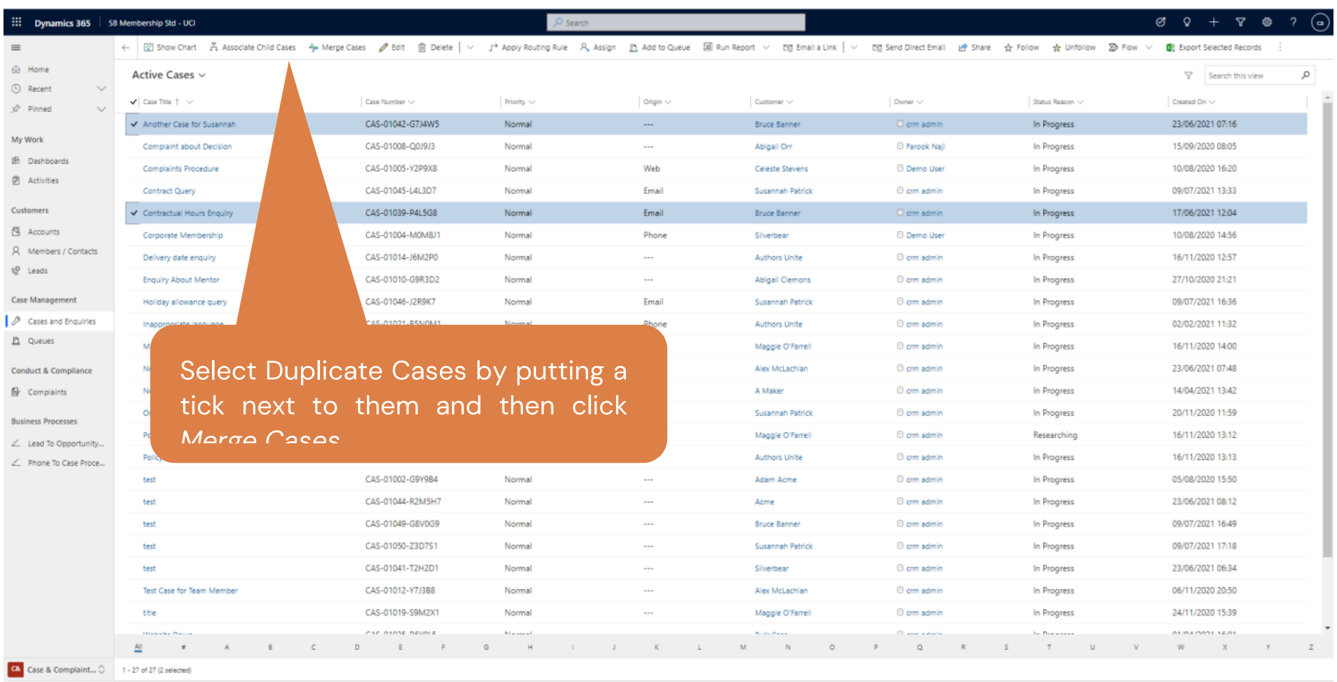
2.7. Case/Enquiry Relationships

Cases can be linked to other Cases in three different ways:

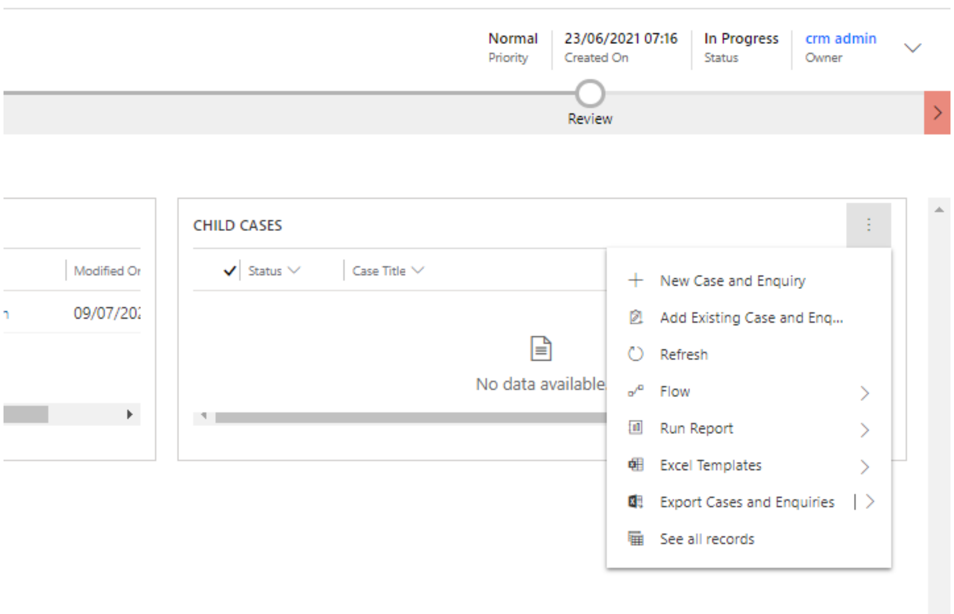
- *Similar Cases* – press *+New Connection* to select another Case with similarities to this one. This could be used if a number of different customers are raising Cases about the same issue. Please note that this section allows you to create all different types of connections; when searching in the Name field for a similar case, you may want to change the search to focus on only Cases – click the link to (number of) types of record to choose just Cases. You will also need a suitable *Role* e.g., Related Case



- *Merged Cases:* This will show any cases merged into this one. You may have duplicate cases which you want to merge. This process is carried out by selecting duplicate cases on a Case view as below, and then pressing *Merge*. The next step is to choose the Master Case, any other cases will be merged into that one. Once finished, those merged in cases will appear in the Merged Case section on the master Case and they will have the *Status* of Cancelled

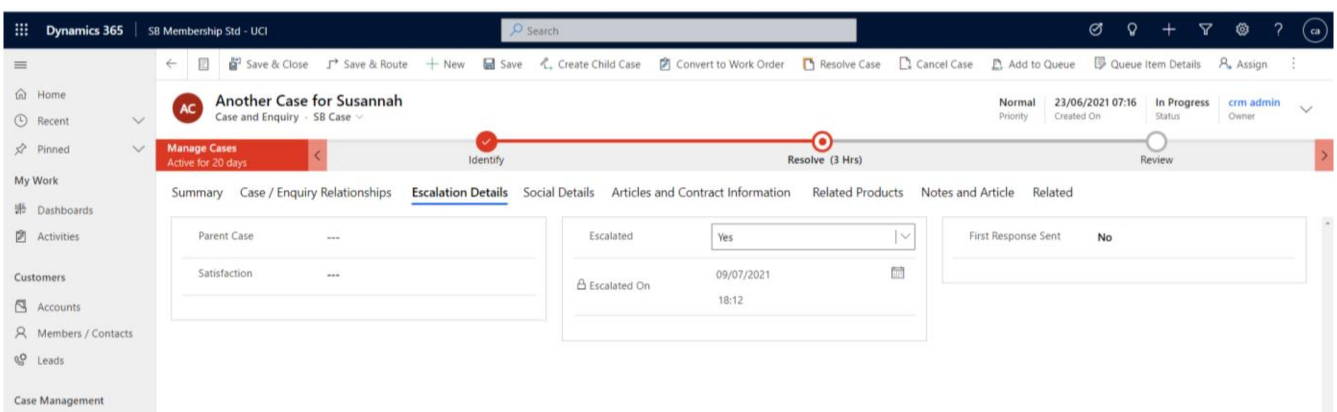


- Child Cases – you can create a hierarchy of cases. For example, you might have a complaint/case from an Organisation and have a series of sub cases or child cases from their staff. In the Child Case section, you can *Add an Existing Case* (one already on your CRM) or create a new one to attach as a child Case



2.8. Escalation Details

Typically, this would include an escalation field which when set to yes would show when this case was escalated. This may have additional functionality such as changing the owner of the case to a particular user or team, or it may be used in a view – a manager may have a dashboard showing a list of escalated cases.

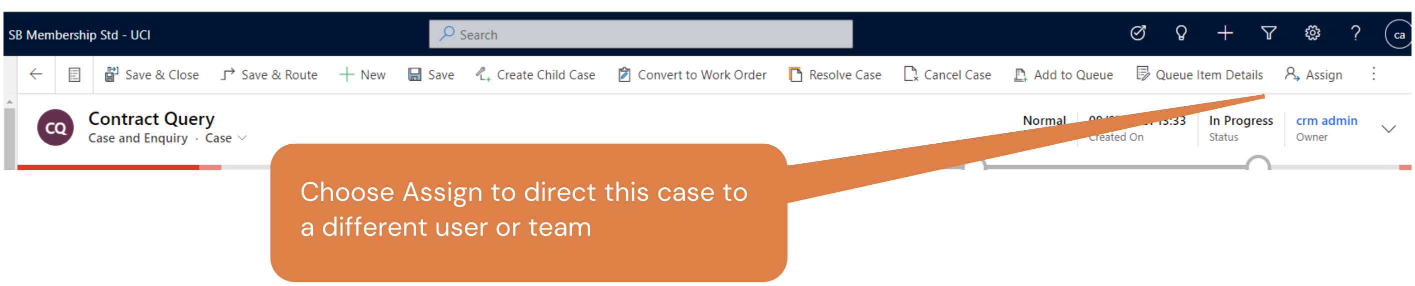


2.9. Knowledge base articles

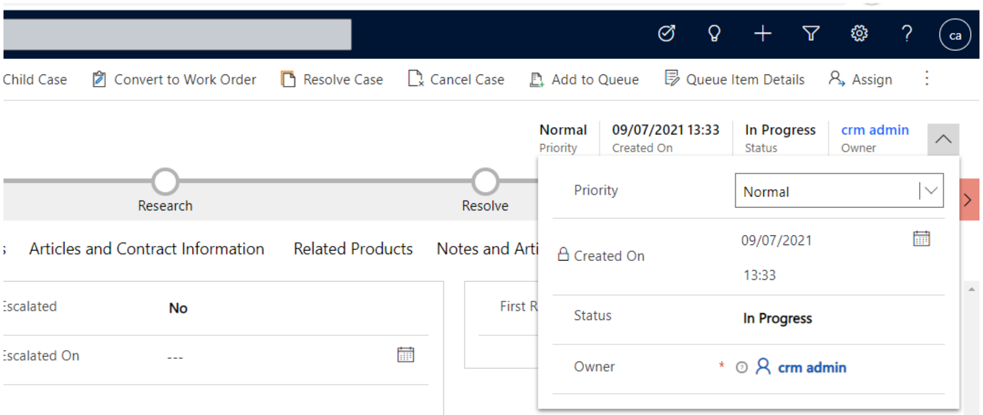
- Knowledge base articles allow your customer services teams to quickly access information which could help them resolve a case, and also gives them resources which they can email to a client.
- Relevant articles (if in existence and activated on your environment) will usually appear in the Notes and Articles section – this is often held in its own tab
- Knowledge base article management is usually accessed through the Service Work Area but it may instead appear in Silverbear Settings or elsewhere.
- Creation and maintenance of these resources is not included in this guide, however there is comprehensive information on Microsoft help pages, including: https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-knowledge-article

2.10. Managing Cases

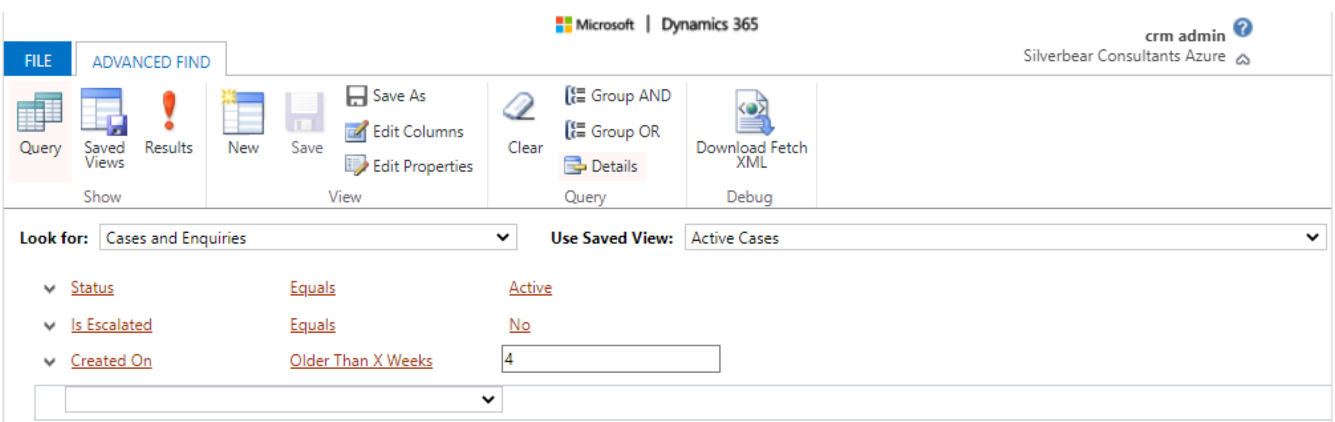
- Cases can be assigned to different teams or users. You may have configuration that automatically routes cases to the correct teams, or cases can be manually assigned by clicking *Assign* on the Command Bar, or changing the owner in the top right of the screen



- The priority and status can be changed in the top right-hand corner



- Cases can also be added to Queues. Please see further sections in this module for more information on using Queues
- It may be helpful to create views of cases using fields such as *Subject*, *Type, Priority*, *Owner* and *Escalated* in order to ensure that the correct teams and team members are working on the right cases at the right time. These can be added to dashboards. The example below is an advanced find which will retrieve cases that are active and were created over 4 weeks ago but have not yet been escalated– a view similar to this could be used to flag to a manager any cases which may need to be escalated. More information on Advanced Finds and creating views can be found in the Fundamentals – Intermediate module



2.11. Resolving Cases

- When all the stages necessary to resolve a case have been completed (your Business Process flow may be set up to guide you through this, or you may also need to compete fields within the main form) press *Resolve Case* on the Command Bar.
- Please note that just working through the Business Process Flow does not normally complete the resolution process, you will still need to click *Resolve Case*
- Alternatively, Cases can be cancelled – click *Cancel Case* on the Command Bar

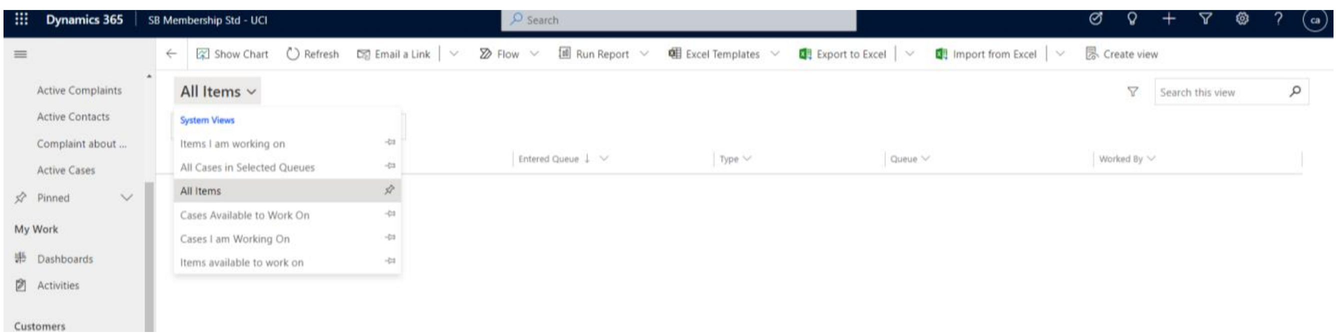
3. Queues

3.1. Introduction

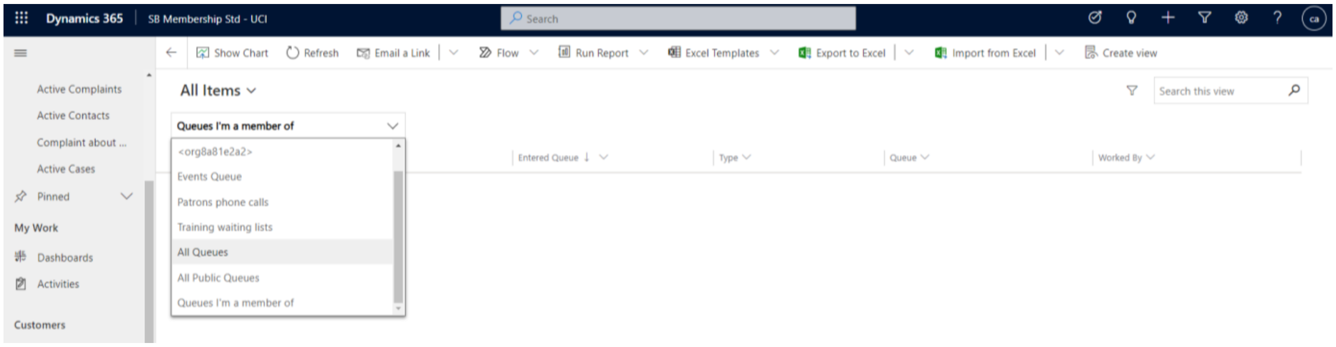
- Queues can be thought of as a virtual in tray. They are used to manage and route work items
- They differ from other views or lists because a mixture of different records can appear in a queue
- By default, Cases and Activities are enabled for queues, but your CRM may have been configured so that other records, for example Individual Applications, Refunds or Quotes could also be included in queues
- Emails to specific inboxes can automatically be routed into a queue

3.2. Accessing Queues

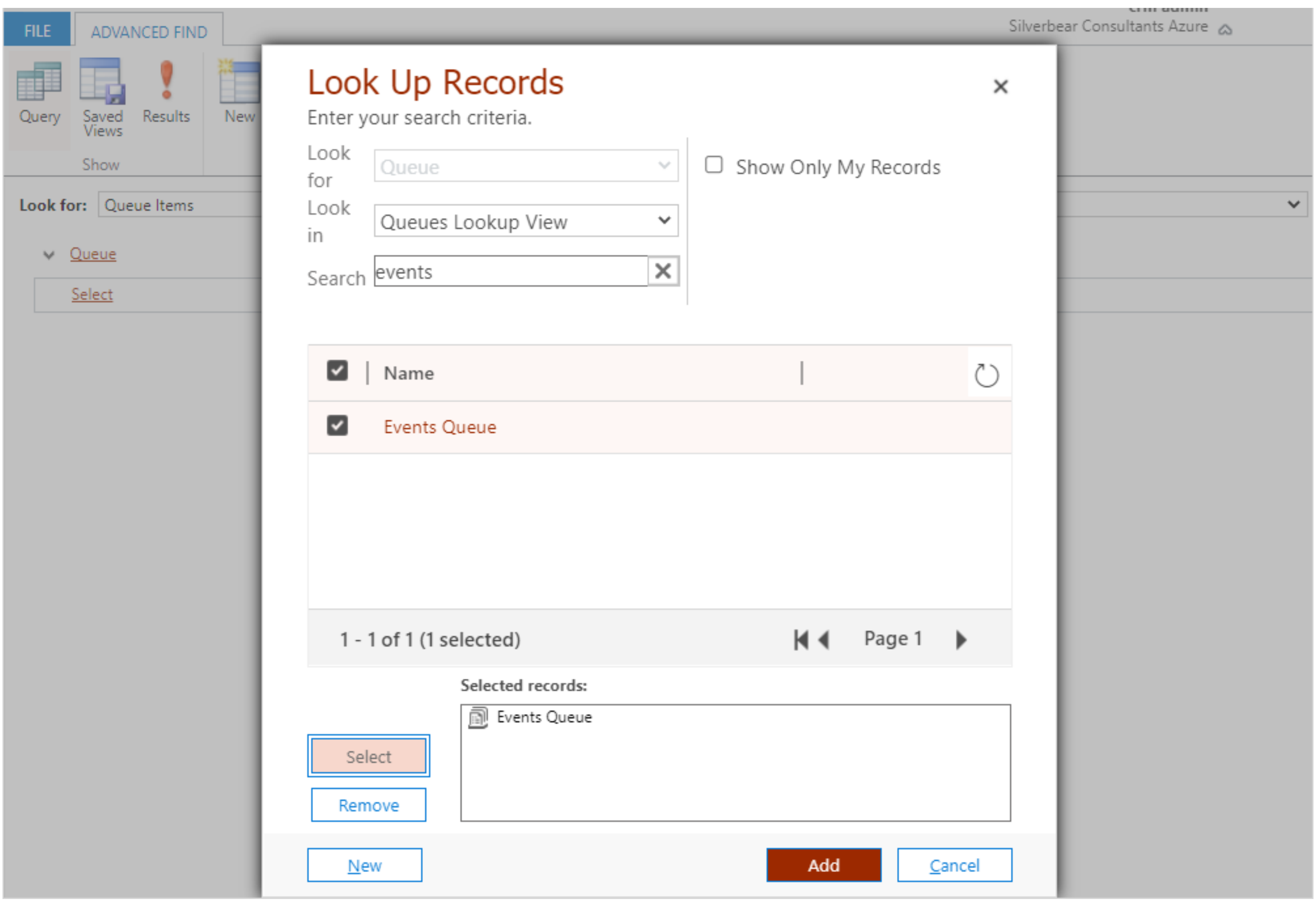
- Queues are usually accessed through the Service Work Area – they may appear on alternative or additional Work Areas
- There are several useful views (lists) created as default –click on the drop-down arrow next to the view name) to see what is available



- You may also need to change the filter to select a different queue or change it to **Queues I am a Member Of.** Your CRM may be set up so that you can only access specific queues relevant to your user role

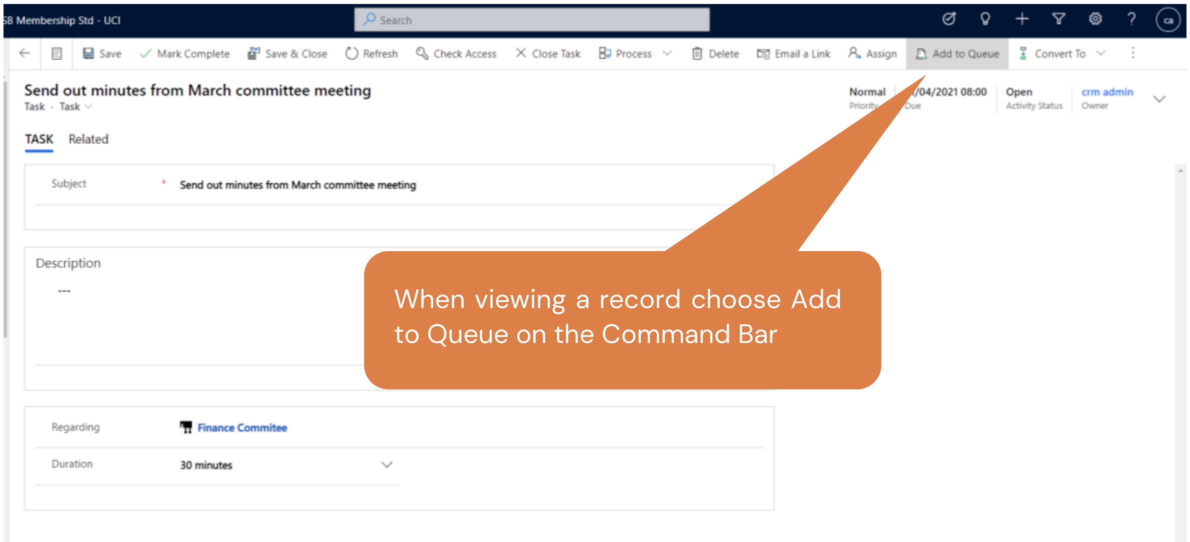


- Views can be created for individual queues and these can be added to dashboards. The following selection would create a view for the Events Queue:

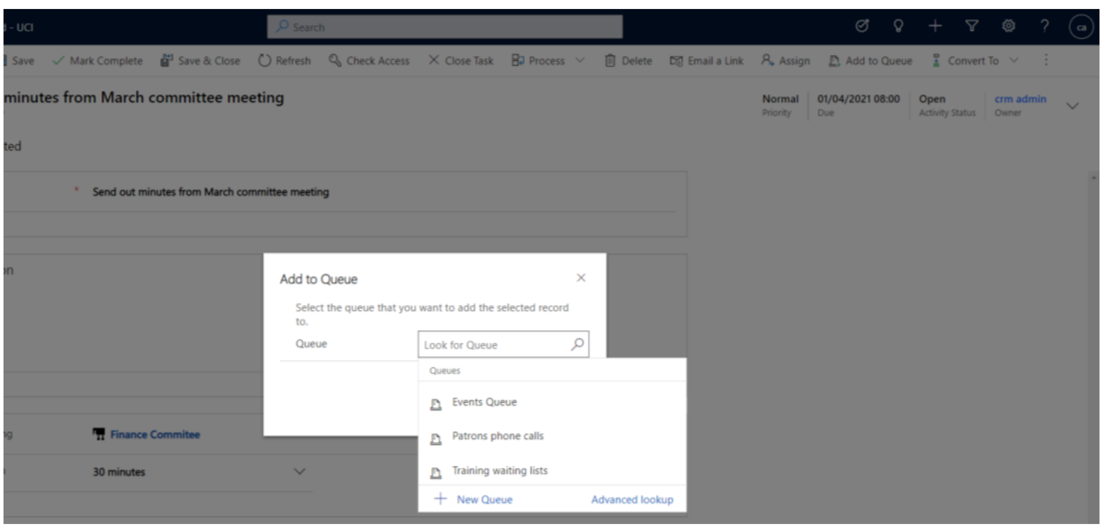


3.3. Assigning items to Queues

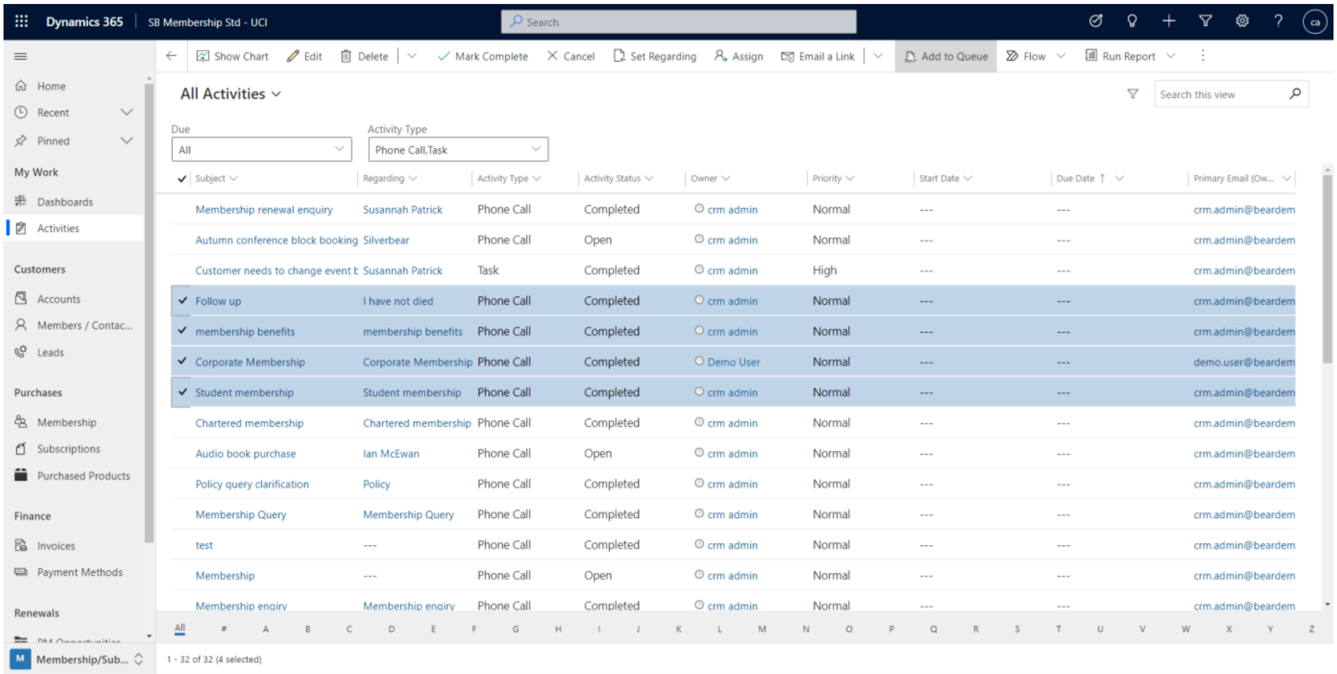
- If a record type has been enabled for Queues (Case and Activities are by default enabled),those records can be added to a queue by clicking Add to Queue on the Command bar when viewing the record



- Next choose the Queue to add the record to

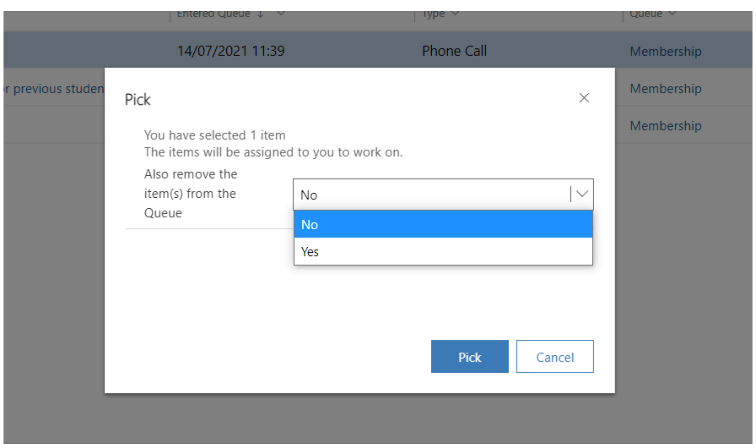


- Applicable records can also be added to a queue in groups by selecting them on a view and choosing Add to Queue on the Command Bar

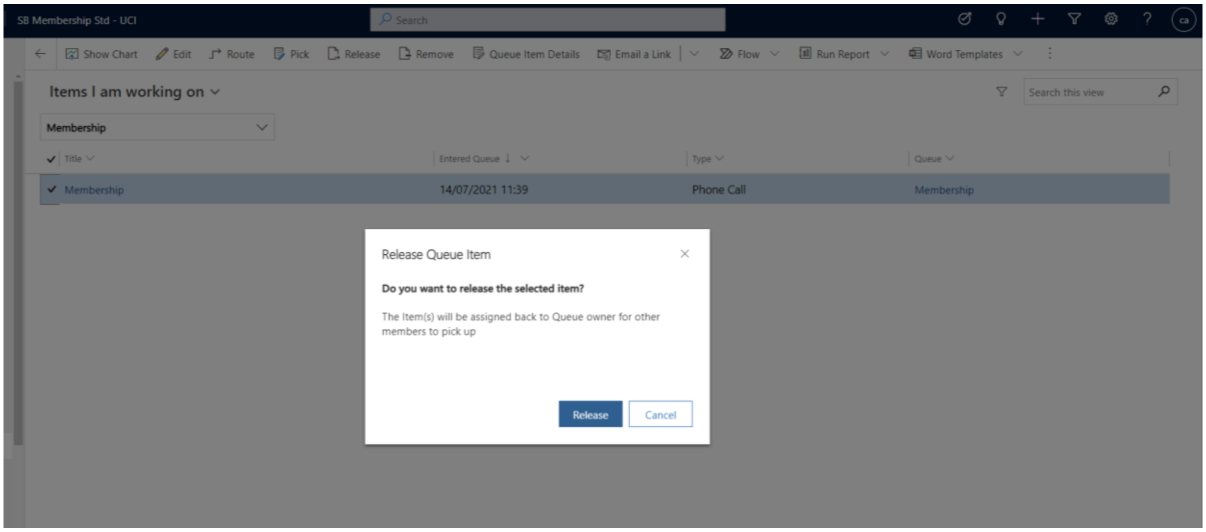


3.4. Handling work items from a Queue

- Users can Pick items from the queue to work on.
- The user can choose whether to remove the item from the queue.
- If they do not choose that option this the item will remain in the queue system but their name will appear in the Worked By column.



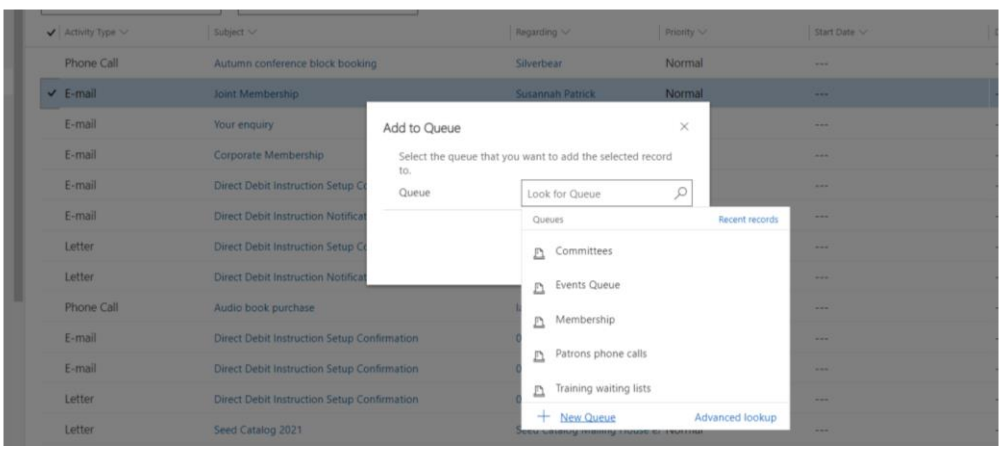
- Picked items will appear in their **Items I am Working On** view – as long as they have not been removed from the queue
- Items can be released by a user, tick next to the item and press *Release*. The *Worked By* field will be cleared so that it can be Picked by another person



- Completed items (e.g., a resolved Case) will be removed from the queue, so that it only shows active work

3.5. Queue configuration and customisations

- Queues are normally created by Systems Administrators or Silverbear team members
- Queues can be created by clicking *+New Queue* when searching for a Queue to add a record to



- Queues can either be Public (visible to all) or Private. Users can be individually added to Private queues
- A Queue can be linked to a mailbox so that emails to that inbox are automatically held in that queue
- Configuration can be in place to automatically route certain records into a queue, please check with your Systems Administrator in the first instance to check if this is in place.

- Systems Administrators may wish to refer to the Microsoft guidance on queues and case management https://docs.microsoft.com/en-us/learn/modules/using-dynamics-365-queues-to-manage-case-workloads/

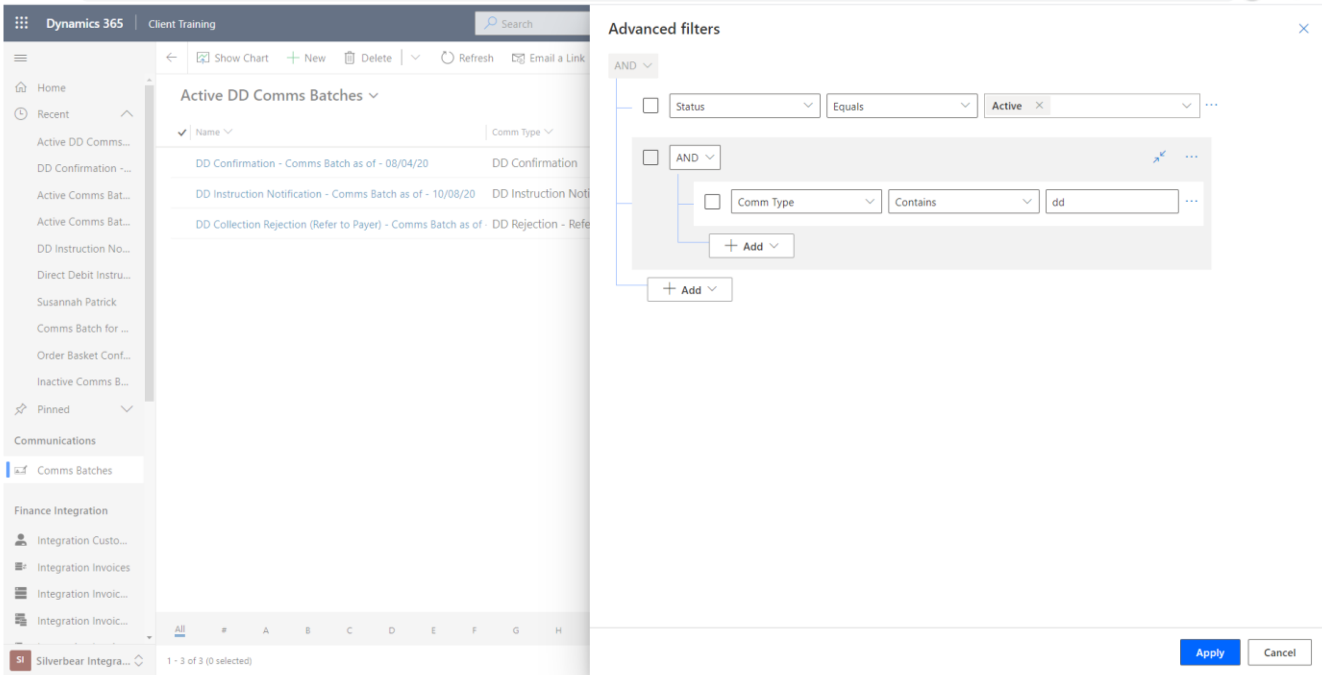
4. The Comms Batch Tool

4.1. Introduction

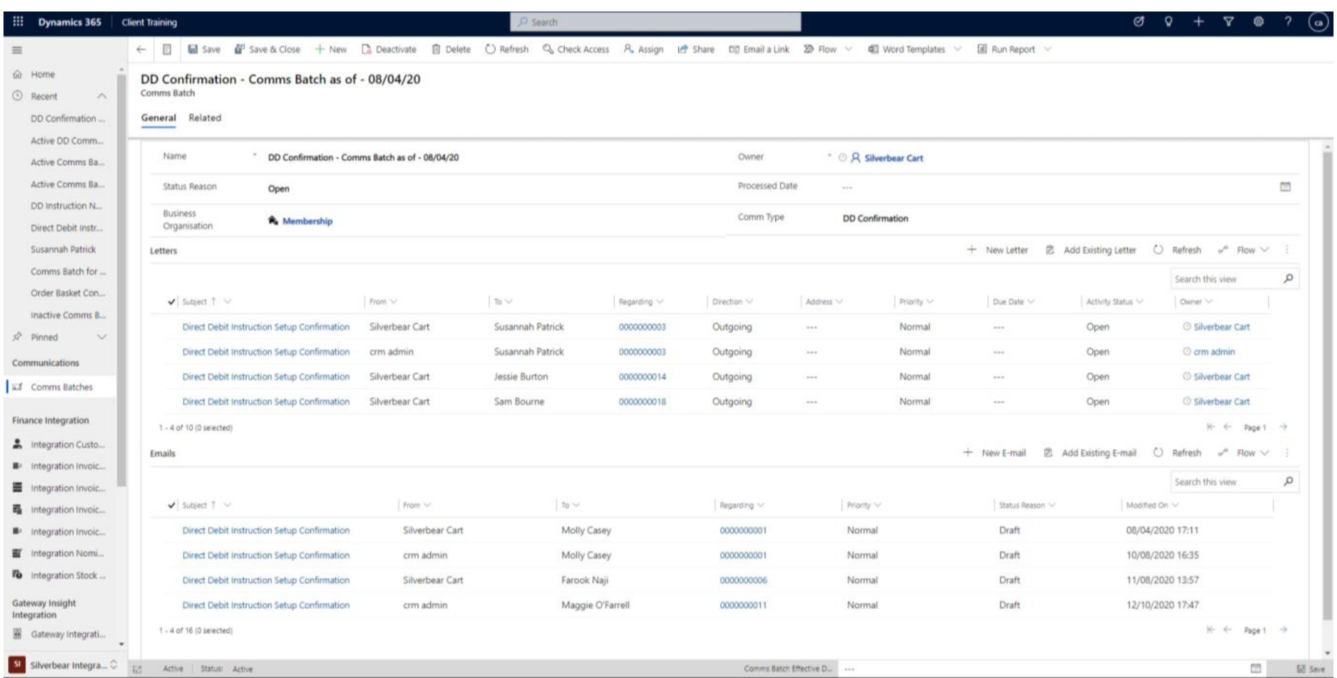
- The Comms (Communications) Batch tool is an app that runs on a virtual machine or servers. It connects to your CRM and is used to send or produce communications which have been created in, but not sent by, the CRM
- The most common use for this is to send printed letters for circumstances where you can't or do not want to use email communication, e.g., when the customer record does not include an email address
- Typically, the Comms Batch is used for Direct Debit and Renewal communications, but you may use it for other letters
- Comms Batch configuration and letter and email template creation will have been put in place by your Silverbear consultants

4.2. Checking if communications need to be sent

- Change the Work Area to *Silverbear Integration* and choose *Comms Batches*
- A Comms Batch will hold all the unsent communications for a particular communication type e.g., Direct Debit Setup Confirmation and that batch is added to as new items are created.
- If you have not used the tool to send communications (covered in the following sections) you may have a batch that includes lots of communications over a period of time. When the tool is used to send them out, that batch is closed.
- A new batch will be created as soon as some unsent communications of that type are created in the CRM
- You may want to create *Comms Batch* views for particular types of communications and add those to dashboards, such as in the view below



- When you open a batch you can view the different communications that are included. If you have both email and letter communications they will be shown in each corresponding section

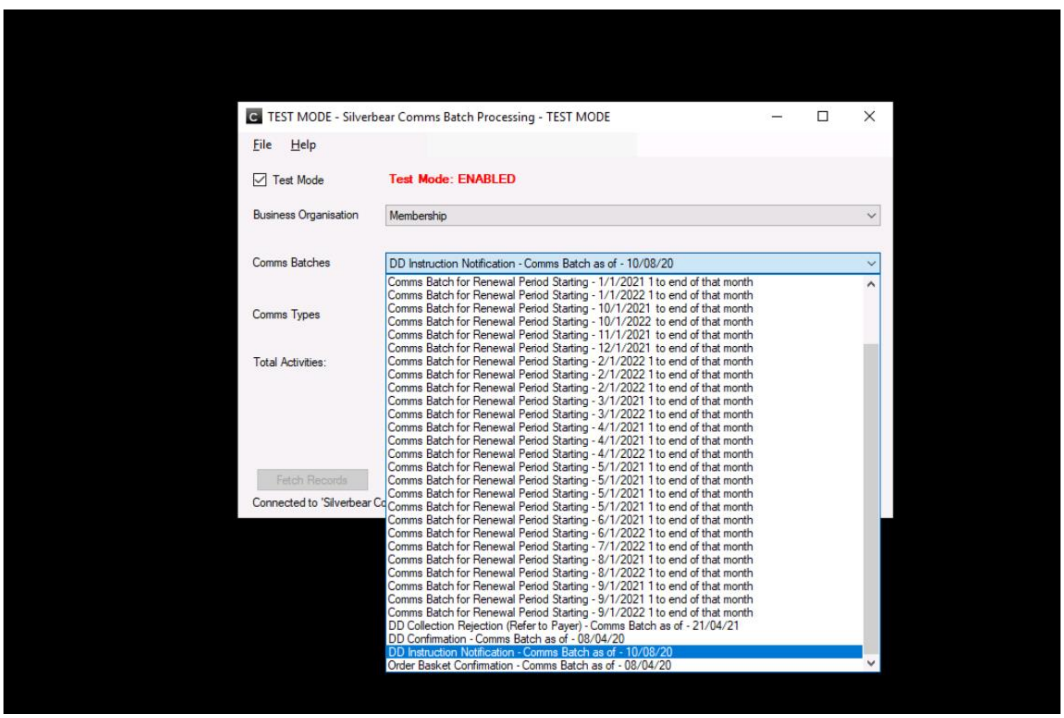


4.3. Accessing the Comms Batch Tool

- When you need to create/send these communications, access the Comms Batch tool

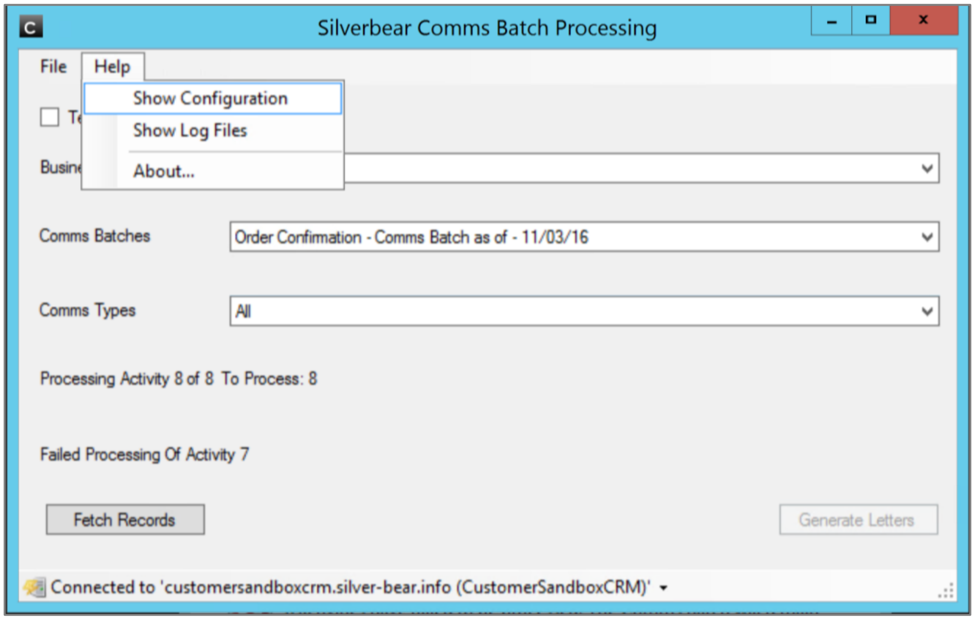
- This tool is accessible through the same method as your Direct Debit and Bulk renewal tools. Your Systems Administrator should be aware of the user access arrangements for these applications
- The shortcut should look like this:

- Once open you may need to launch the connection to your CRM in the bottom right of the tool and enter your CRM user credentials
- If you are testing or training on this tool, please make sure you choose Test Mode – this will produce letters but will not update the CRM to show they have been created
- Choose your *Business Organisation* (your Company)
- Choose the batch that you want to produce letters for, in this example we are creating letters for Direct Debit instructions

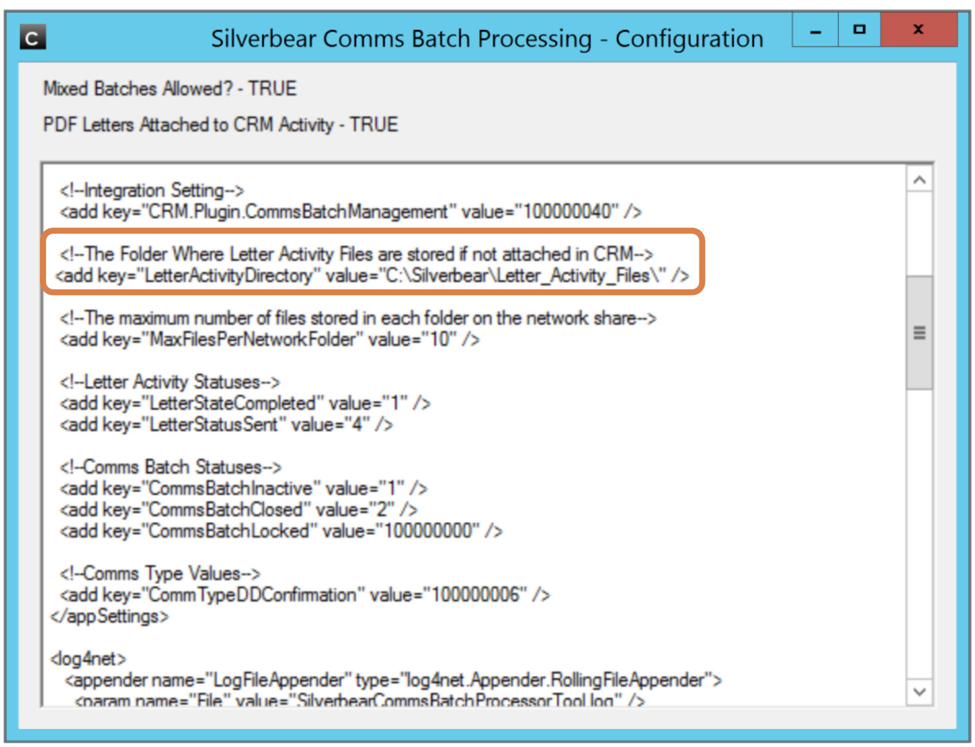


- Press *Fetch Records* to see a total of letters to be created
- Press Generate Letters

- A PDF containing the letters to despatch will be stored in a pre-set folder on the virtual machine, you should be able to access this file and store on your server/local machine and then print the letters
- If you have not used this tool before, you may need to check where that pdf file is located. Click on the *Help* tab and select *Show Configuration:*



- You will need to scroll down to find the information on where the reports are stored



4.4. Changes in CRM

- Once the process is completed by the Tool, in CRM the Batch will be appear in the Inactive Comms Batch view. The Batch will be in an ***inactive status*** and a status reason as ***closed.***
- The *Processed Date* will be populated with the date you processed the Batch in the Comms Batch Tool
- The interactions should appear on the timeline for the relevant records (e.g., the Contact Timeline)

5. Outlook email tracking into Dynamics

5.1. Overview

- If you use Outlook the emails that you send and receive can be tracked (copied into) the related records (e.g., a Contact record) in Dynamics. This allows you to maintain a true picture of communications without extra work. This needs to be configured so please check with your Systems Administrator if unsure if you have this facility.
- Email tracking can be automatic (all emails get tracked into the Silverbear CRM and new contact records are created automatically if the email correspondent does not exist) or it can be manual, giving you control over what goes into the e.g., CRM. The latter is more common.
- Emails can be found in timelines
- More information on Outlook tracking into dynamics can be found on Microsoft help pages, for example https://docs.microsoft.com/en-us/dynamics365/outlook-app/user/basic-navigation

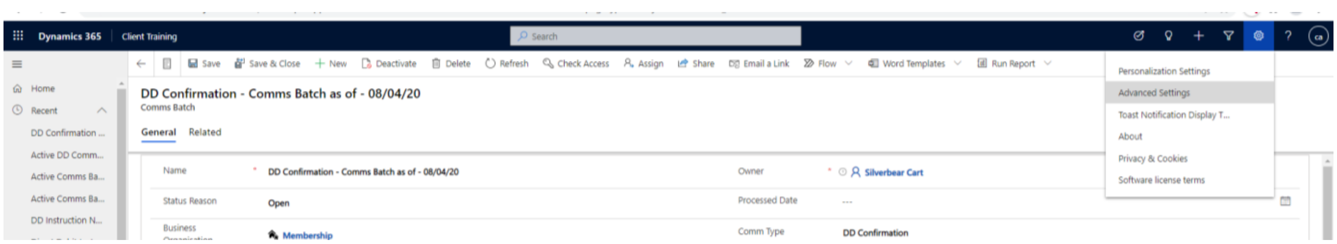
6. Email templates

6.1. Overview

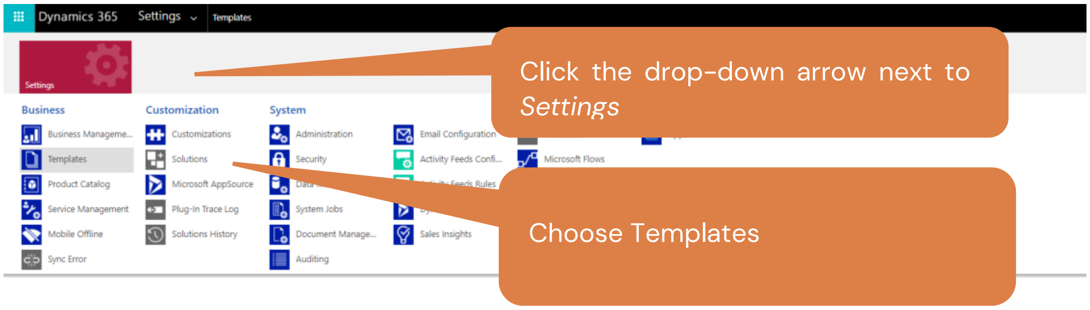
- Standard emails can be created in your CRM allowing you to save time by using a template rather than manually typing content
- Email templates can be combined with automation, meaning that those emails are sent out automatically when certain requirements are met – for example an email template could be used to welcome a new member to your organisation, and this could be sent out as soon as that membership record is created
- Your Silverbear consultancy team are likely to have created some email templates and used automation. Emails created through this process will appear in timelines
- This section explains how to edit existing templates or create new email templates which can be used with individual communications. Automation is out of scope for this module. Systems administrators interested in creating automated emails may want to contact Silverbear regarding our Blended Development training

6.2. Accessing templates

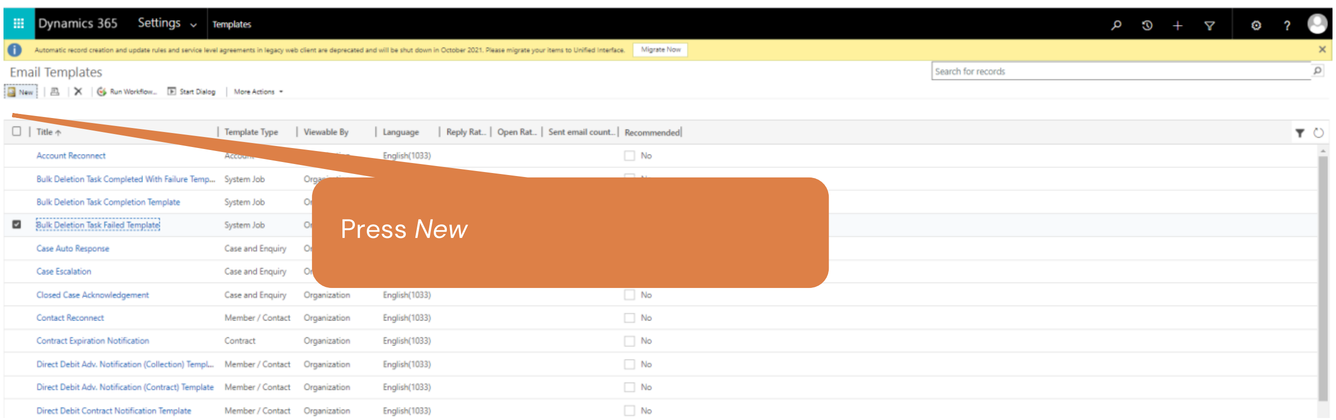
- To view templates, you will need to access the Advanced Settings. Click on the gear/cog symbol on the top right of the screen and choose *Advanced Settings*



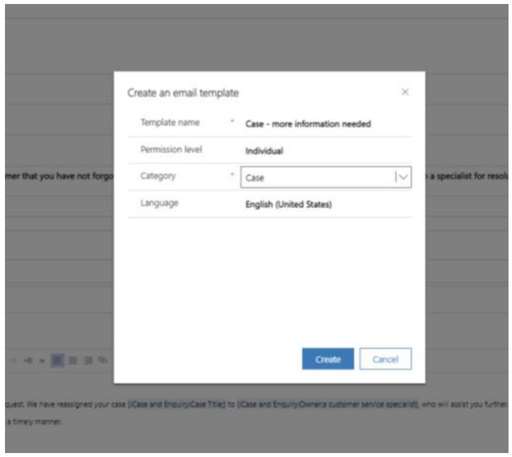
- The navigation of this area of Silverbear is different to the standard UCI navigation; you no longer have a left hand menu and your navigation is carried out using the top bar
- Click the downwards arrow next to *Settings* and choose *Templates*



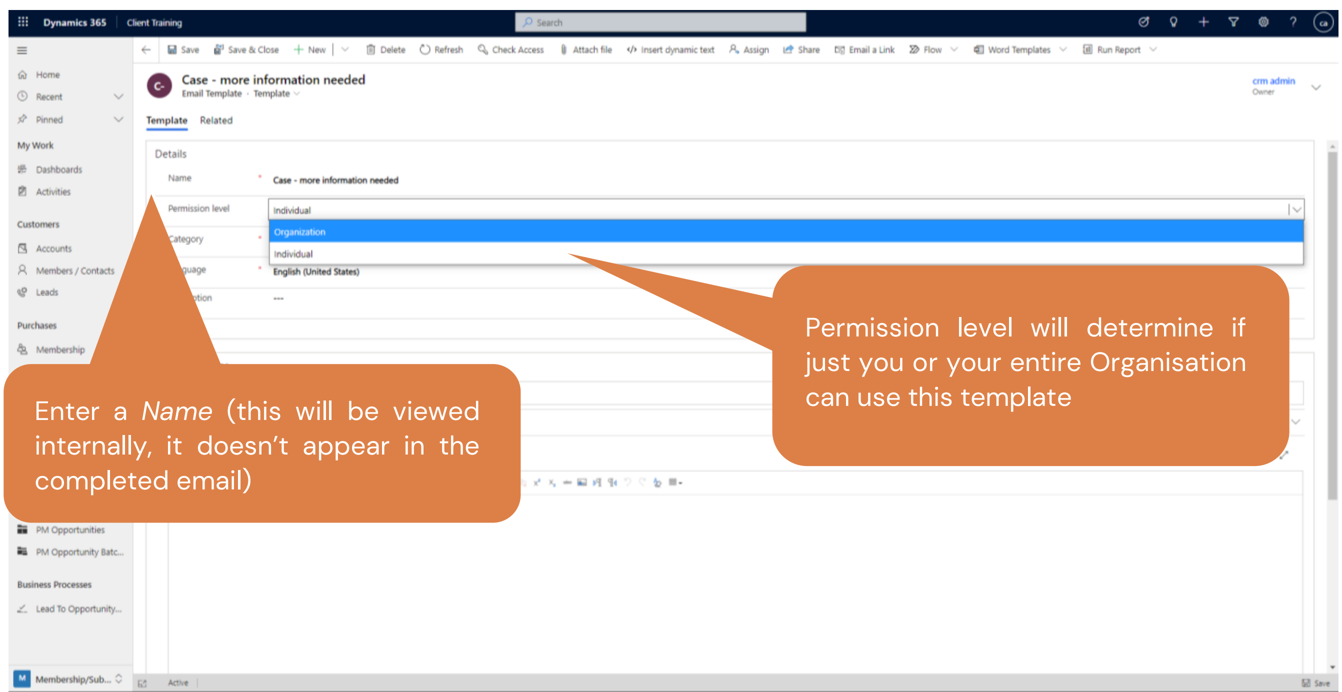
- Select the *Email Templates* option
- Existing templates will be listed. Please note that many of these may be actively used in workflows and therefore no changes should be made without checking with your Systems Administrator or Silverbear, however you can set up new templates
- Press New



- Choose the record type which you want to work with – the record type that you will create the email from. The fields from this record type (entity) will be available as merge fields (dynamic text) when you create your content. Related entity fields may also be available. In this example we are creating a template that can be used with a Case record

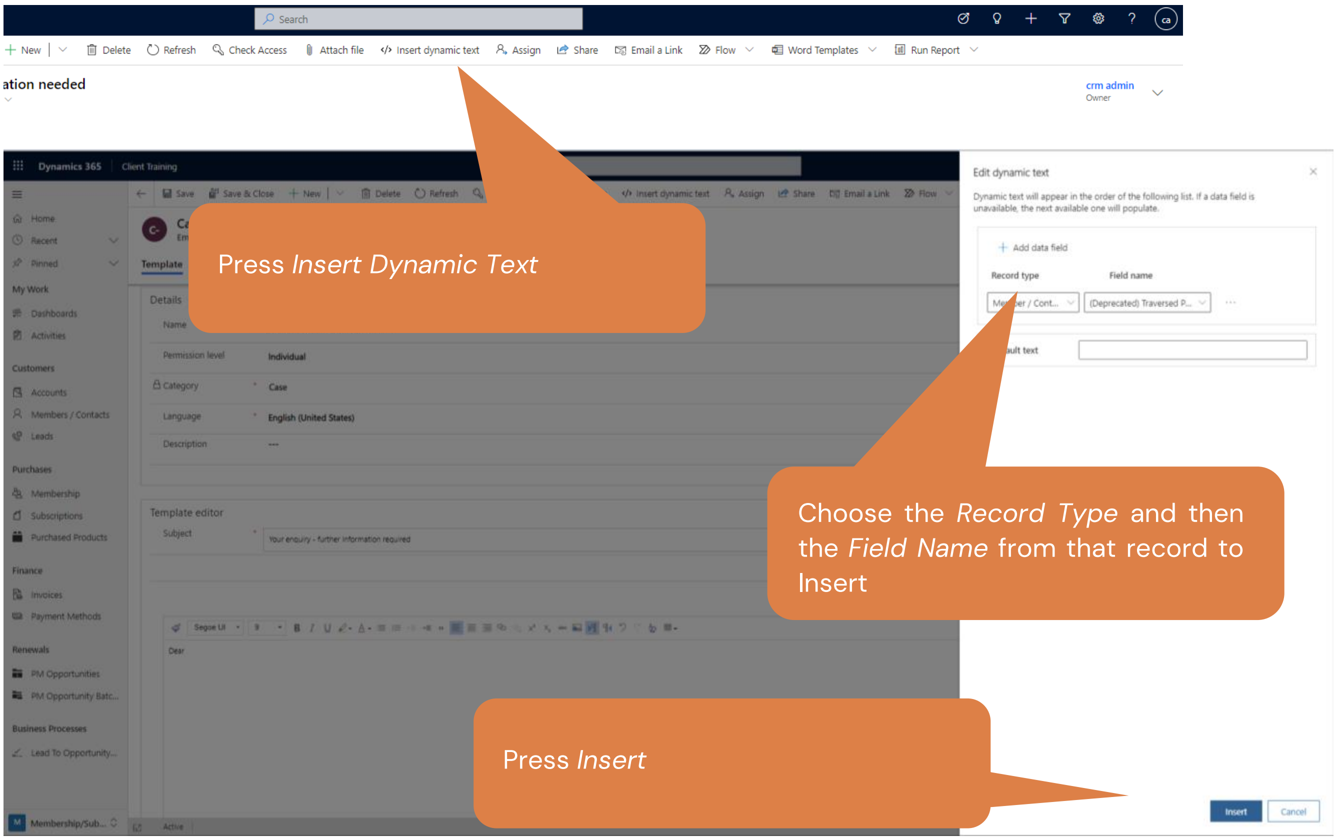


- Choose a *Name* for your template (so that you can easily identify it when choosing templates)
- Set the *Permission* level. Organisation templates can be used by everyone, Individual templates can only be used by you

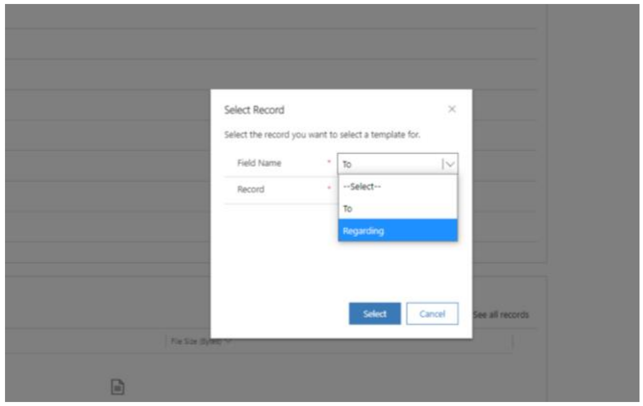


- Next enter a *Subject* (this will appear in the Subject line on the recipient's email)

- Start building your content. Basic text editing functions are available, and you can paste content in from other sources
- Press *Insert Dynamic Content* on the Command Bar to add in merge fields from selected records. Choose the *Record Type* then the *Field Name* and press *Insert Dynamic Text*



- Continue building your content with a mixture of standard text and dynamic text, you can mix and match fields from the different records. You may find it helpful to have examples of those records open on separate tabs so that you can check field names
- Press *Save and Close*
- To test your template, go to a record of the type you created this template for (in this example a Case)
- Open a Case (if you already have a Case open you may need to refresh your screen)In the Timeline section click the + button then *Email*
- Press *Insert Template* on the Command Bar
- With this particular record type, change the *Field Name* to Regarding, as we are contacting someone about a Case. That will allow us to choose our Case email template



- Choose your template from the list. A preview will appear. Press *Apply Template*
- The email editor will appear; you can add to and edit this email
- Press *Send* on the Command Bar to send the email
- The Email will then be marked as closed and stored in the Timeline for that case

7. Word Templates

7.1. Introduction

Dynamics allows you to create your own Word Templates so that you can have standard communications such a membership cancellation confirmation letter, or a case escalation letter which can be produced from CRM, and will include merged in information from relevant records. Please note that these will be available to use against individual records. They can be posted or attached to emails.

Once set up, this can save time and standardise communications.

Before starting we recommend you have an existing letter that you would like to replicate and have looked at the CRM to see which records (entities) the particular information is held in.

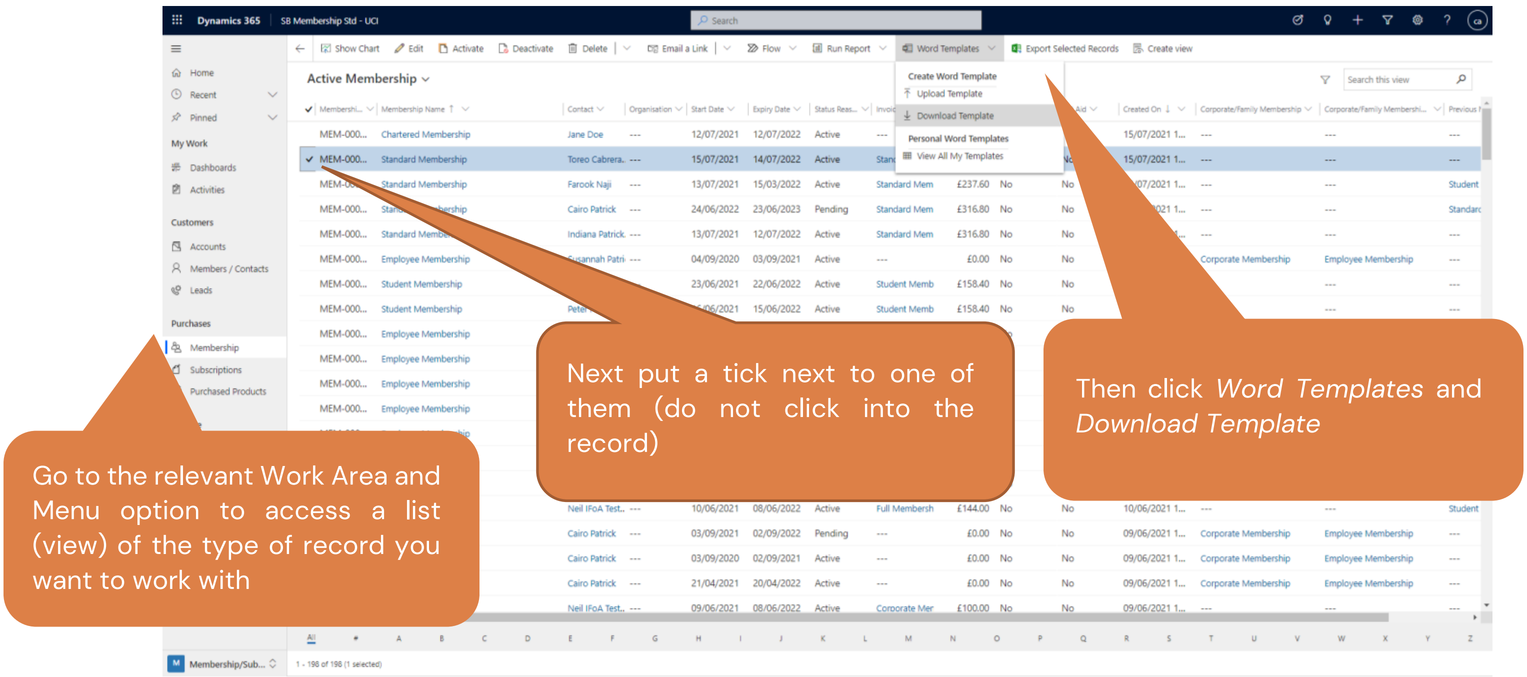
There are a few steps to create the Template letters

- Once you have identified the record type and the related record types (by going into the first record and clicking *Related* and looking at the options) that hold the information you need, navigate to that initial record type and download an empty Word Template
- Use the Developer tools to create a new letter which will contain mail merge fields from that first record type and up to two related records. This letter will also contain text that you write yourself, e.g., information about the management of the case. Save that template to your own computer files
- Upload that template to Silverbear.
- It now then stored on the CRM from that point you will be able to run that template against a record to produce an editable letter to send to the client
- Templates can be shared across your Organisation

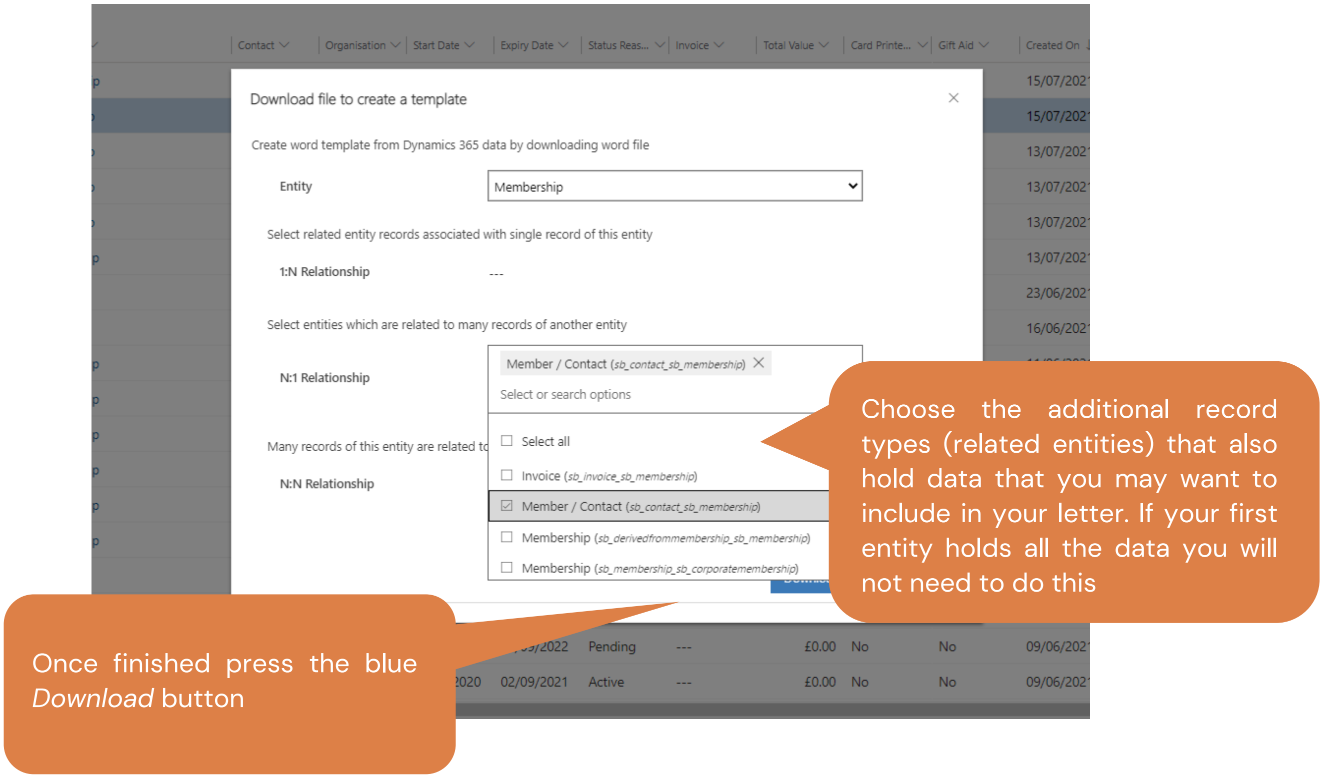
7.2. Step 1 – Download a MS Word template

- First do some investigation – consider the contents of the letter you want to write and compare that to your CRM. Then navigate to a list of the types of record that you will work with. The most likely ones are Contacts, Accounts, Invoices, Memberships, Cases as these hold a lot of information and have very useful records connected to them (related entities). For the following example purposes we are building the framework of a letter that could be used to confirm a cancelled membership and for this we need fields from the Contact record and the Membership record

- Once you can see the correct type of list (view) – in this case Memberships – click once to select any record in the list view (ensuring not to click into the record, but simply select it using the small check box to the left-hand side of the list)
- On the Command Bar, click the arrow next to *Word Template* and choose *Download Template*. If you cannot see Word Template you may need to click on the ellipses (three dots) to access it

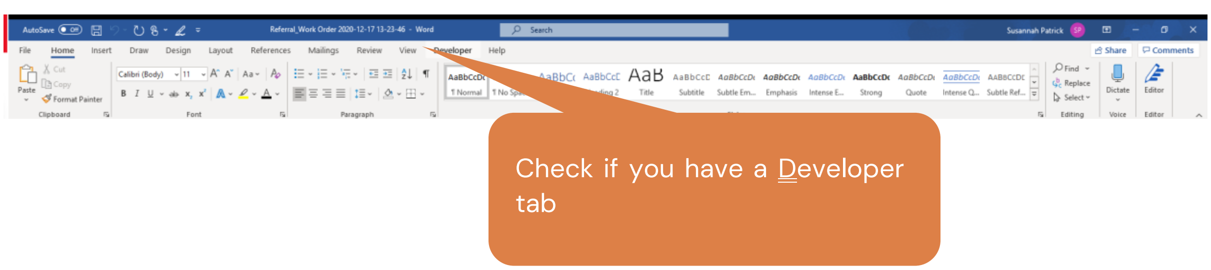


- The Download Template pop up will appear, here you can select the types of records which hold the information which you need to appear in your letter. Please note that not every record type will be available, the choice is determined by the way the data is structured in your Silverbear CRM
- The Entity in the top section will be the record type that you started with. You would normally leave this as it is
- Next choose the entities for the other fields. Click on the downwards arrow next to each one to find the record types that you identified in your research as being useful and connected to record type that you started with. In the example of a membership cancellation confirmation letter, we have chosen the options below:



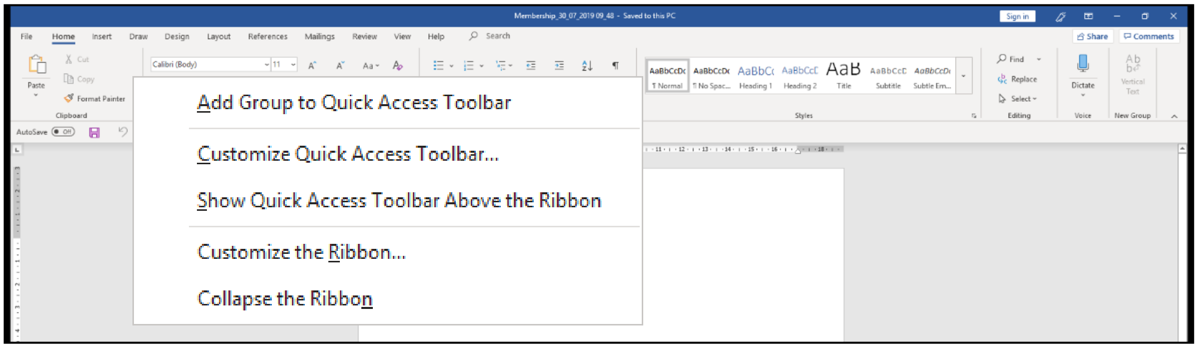
- A blank MS Word document will now open. If necessary, click on any *Enable Editing* flags that appear at the top of the MS Word window.
- If required add headers, footers, logos etc to the Word document. Select the font and font size you want to use or copy pre-prepared content from an existing document

For the next steps you will need to use a command which appears in the Developer Tab in Word

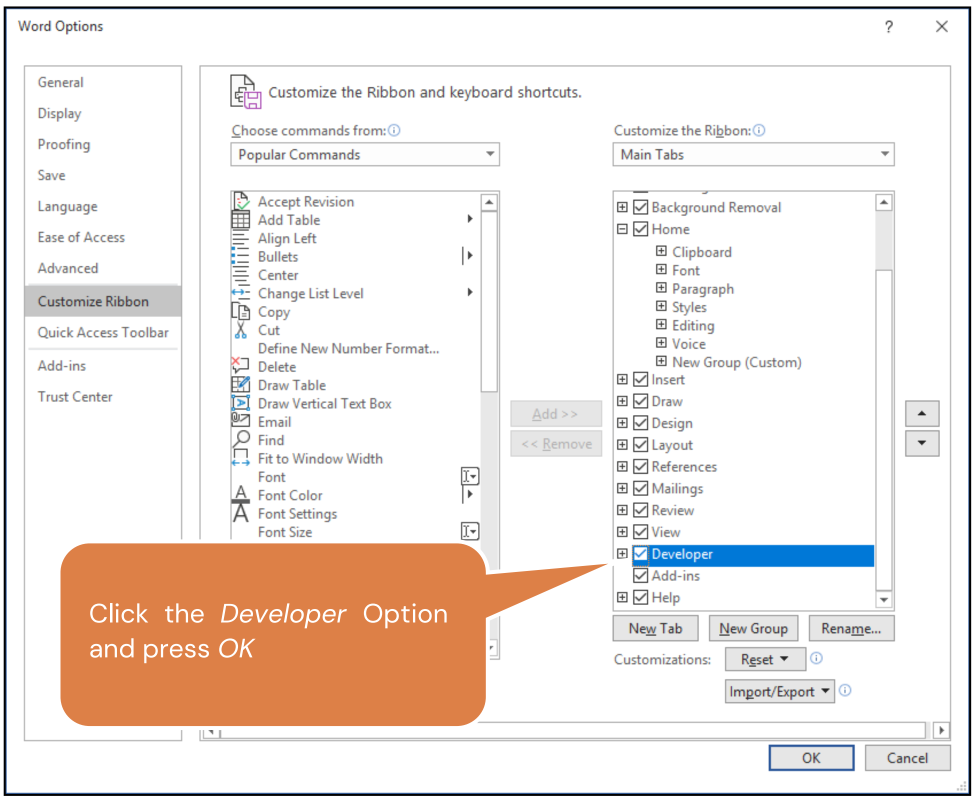


If you already have the Developer Tab enabled, you can move to the section "Use the Developer tools to create a new letter" If you do not have the Developer Tab then continue this section

- Right click anywhere over the MS Word ribbon, and select *Customize the Ribbon*

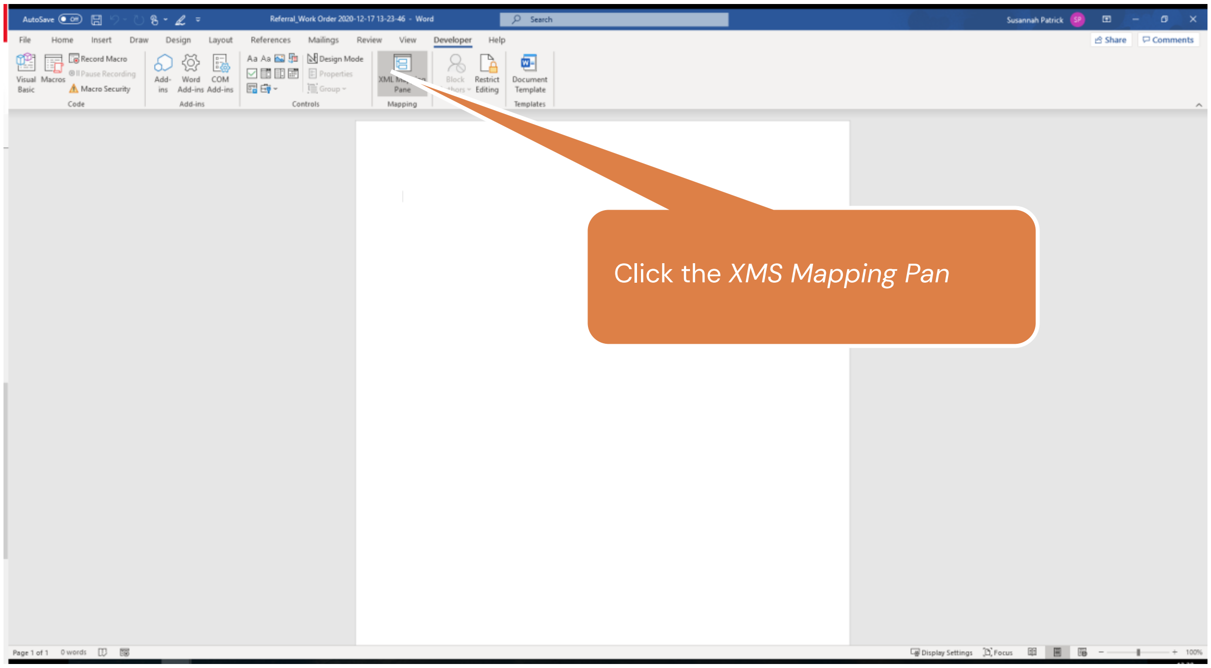


- On the window which appears, tick the *Developer* option which appears on the right-hand side of the list and then click on **OK** to accept the change:

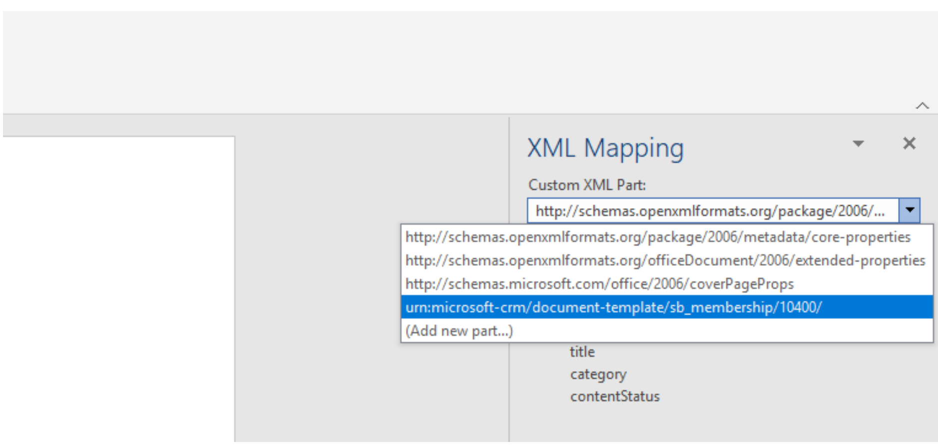


7.3. Step 2: Use the Developer tools to create a new letter

- In the document you downloaded, press the Developer's tab and click on the *XML Mapping Pane* button:



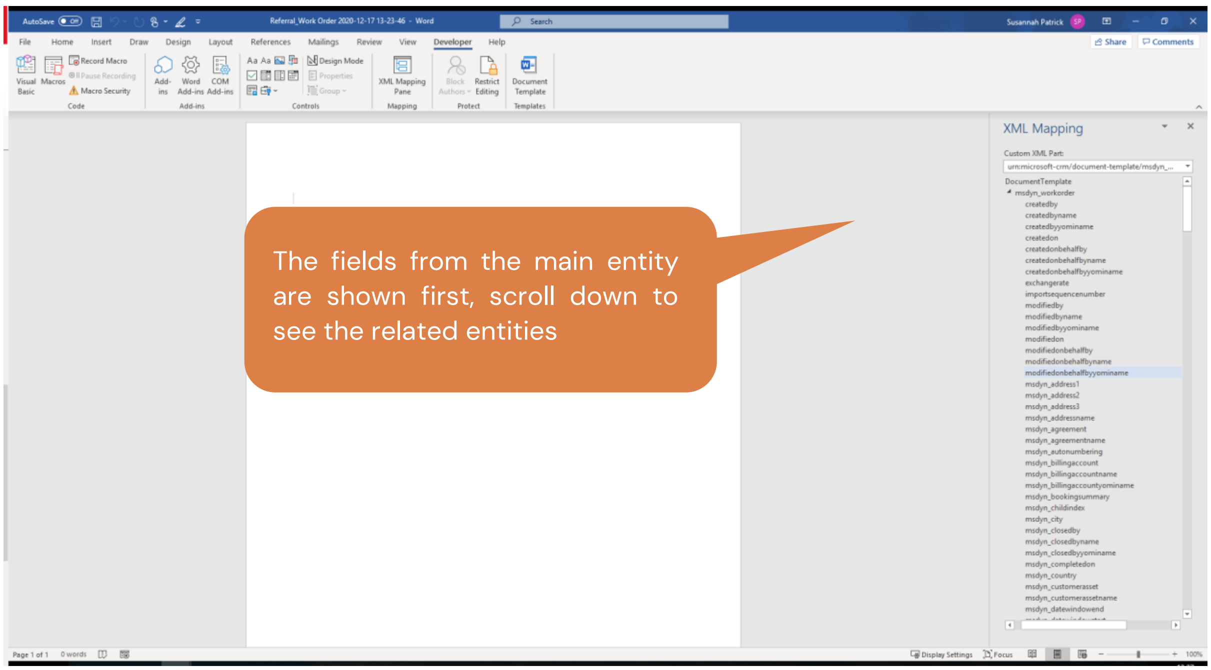
- This will open a panel on the right-hand side of the window. Use the drop-down list and select the Custom Map which matches your CRM data. (As a guide, this will typically start with the words urn:microsoft-crm and end with the entity that your data is coming from



- The fields which exist within the entity you have shared with the MS Word Template will now be available for use. You may need to click on the small arrowhead next to the entity name to expand the list.
- If you have used more than one entity then the related ones will be at the bottom of the list and you can click to expand them. At this point it might be helpful to

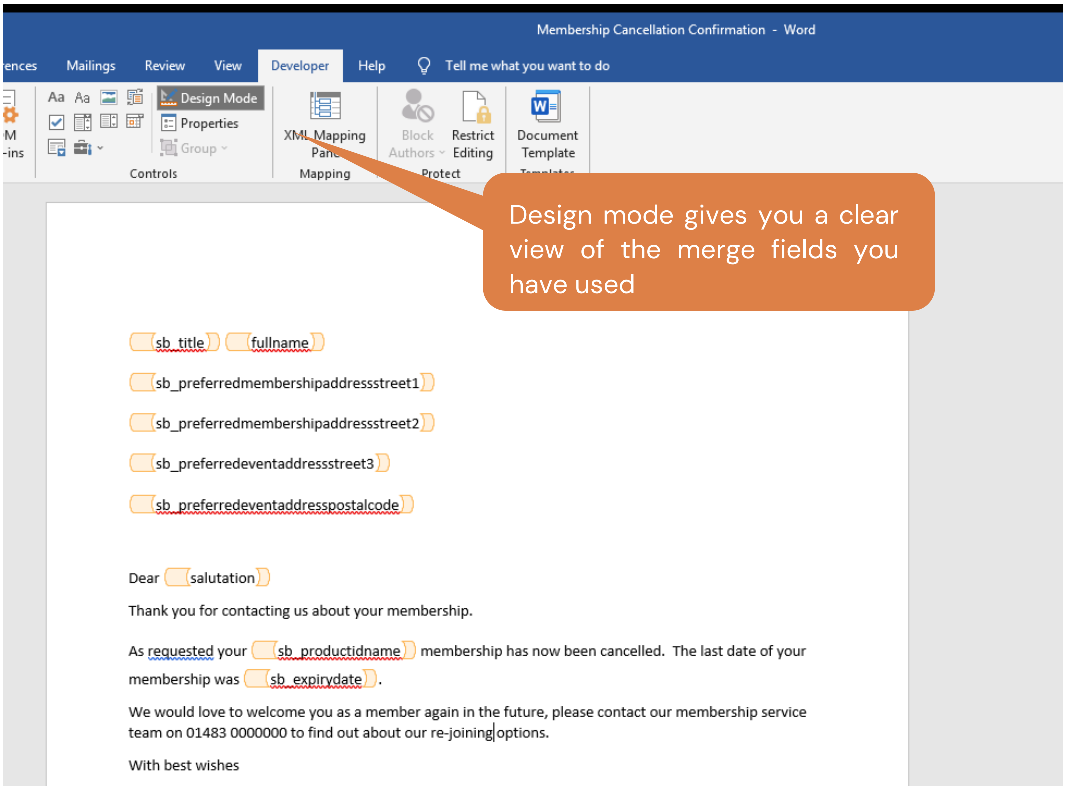
access records on the Silverbear CRM to find out the names of the fields you are interested in using and check which record type they come from

- Some fields (usually locked ones) that appear on some forms are actually held on different records. It may take a little time to piece together where everything comes from that you need for your letter and the names in the list on the mapping pane are not always the display names of the field
- One way of finding the correct names to use is by using the Advanced Find function in CRM. When you are adding columns to an advanced find you are presented with a box of display names and beside it is the names of the fields as they will be displayed in the XML mapping pane. You can use this for reference



- The next stage is to create your letter using a mixture of text and merge fields. For the standard text simply type and edit as normal
- When you need to insert data from the CRM, find the relevant field name in the XML mapping panel on your right. In the example below I want to put in the Contact's Full Name. (I have already used merge fields for the name, address and start and finish time of the appointment). Once you have found the correct field right click on it and press Insert Custom Control, and then Plain Text

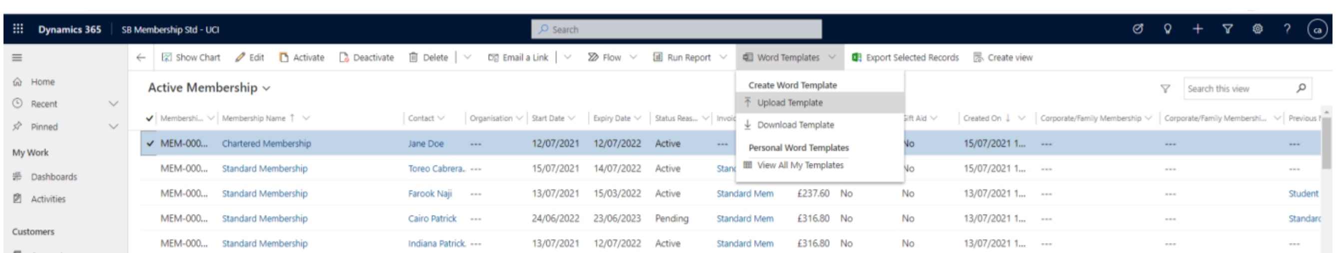
- The merge field will be added to your document.
- Continue creating your document and repeat the same process for all the data you need to have in your letter. To easily see which merge fields you are using, you can click on the *Design Mode* button on the Developer Tab on the ribbon. This displays the content control fields making them easier to see:



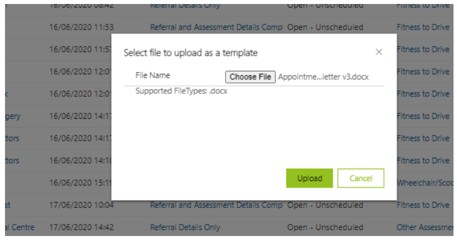
- When you have finished, *Save* the completed document somewhere on your computer. The next step will be to upload it to the CRM for use when you need to produce a letter

7.4. Step 3: Upload the MS Word template letter into your Silverbear CRM

- Now that the MS Word Template has been created, you need to upload it ready to use in the CRM when required
- Repeat the initial steps used to download the Template. Navigate to the set of data that you will use to generate the MS Word Template, in this case the Membership view. Click once to select any record in the list view (ensuring not to click *into* the record, but simply select it using the small check box to the left-hand side of the list)
- On the Command Bar, click on *Word Templates*, and *Upload Word Document*

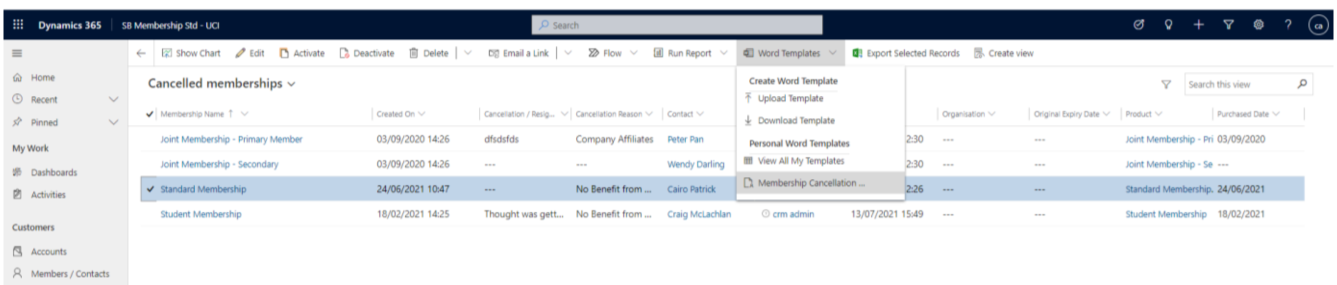


- Click *Choose File* to find the MS Word template you have previously saved. When the file has been successfully attached (you will see the document name appear in the upload window), click on the ***Upload*** button:

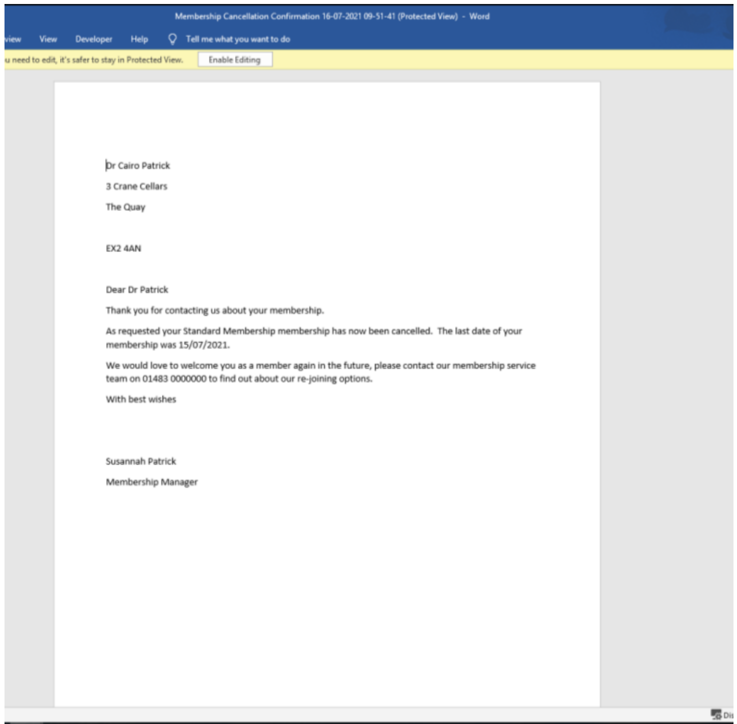


7.5. Step 4: Use the template

- Now that you have uploaded the document you can use it to create standardised letters
- Select the record or open the record that you would like to use with the MS Word template, in this case a membership that has recently been cancelled
- On the Command Bar, select *Word Templates*. Your personal template will appear here in the Personal Word Templates Category. If you cannot see the template you may need to refresh your browser or it could be that you are in the wrong record type



- The document will now be created. Normally it will appear in the bottom of your screen as a downloaded file and you can click on it to open it
- The letter will now be populated with the data from the record you selected. You can edit and update this letter before printing/saving it



Dr Cairo Patrick

3 Crane Cellars

The Quay

EX2 4AN

Dear Dr Patrick

Thank you for contacting us about your membership.

As requested your Standard Membership membership has now been cancelled. The last date of your membership was 15/07/2021.

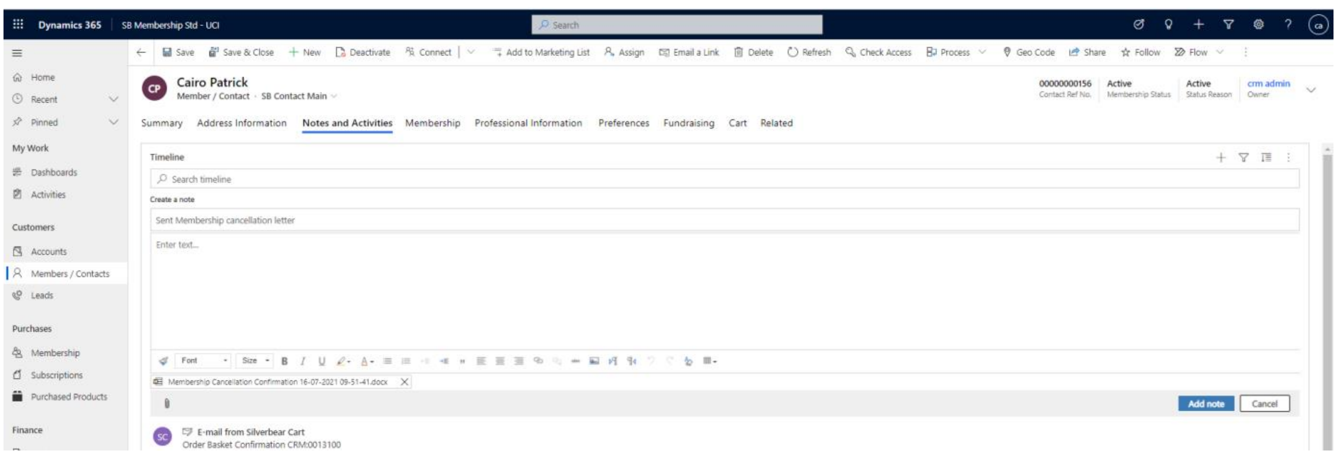
We would love to welcome you as a member again in the future, please contact our membership service team on 01483 0000000 to find out about our re-joining options.

With best wishes

Susannah Patrick

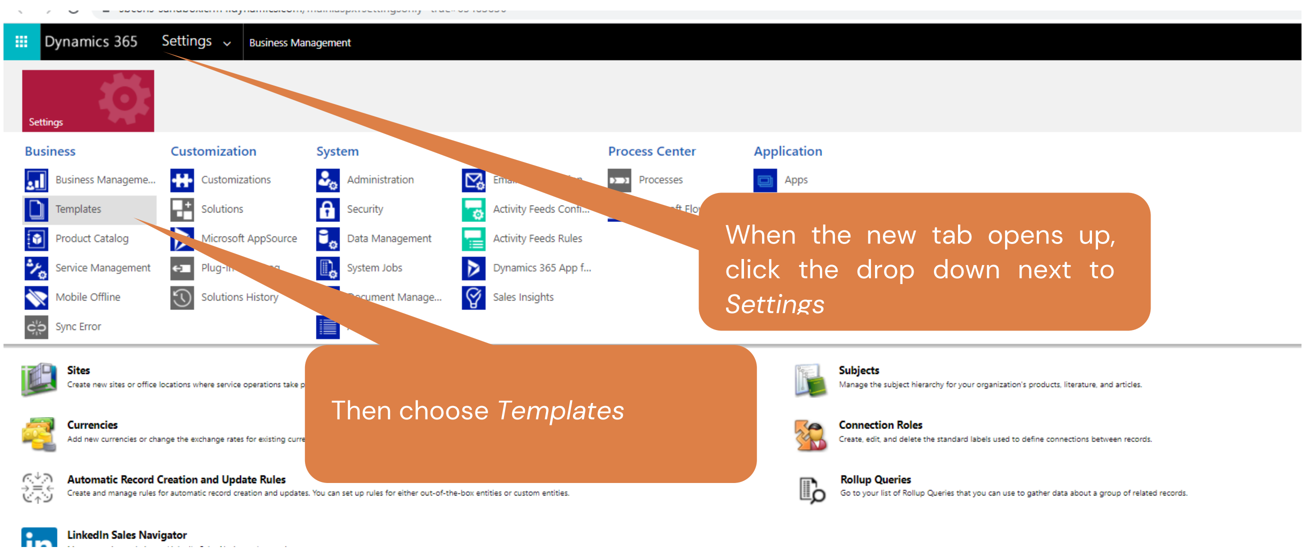
Membership Manager

- Please note that this letter will not be automatically stored in the Timeline for the Contact; you will need to add it as a note and attachment

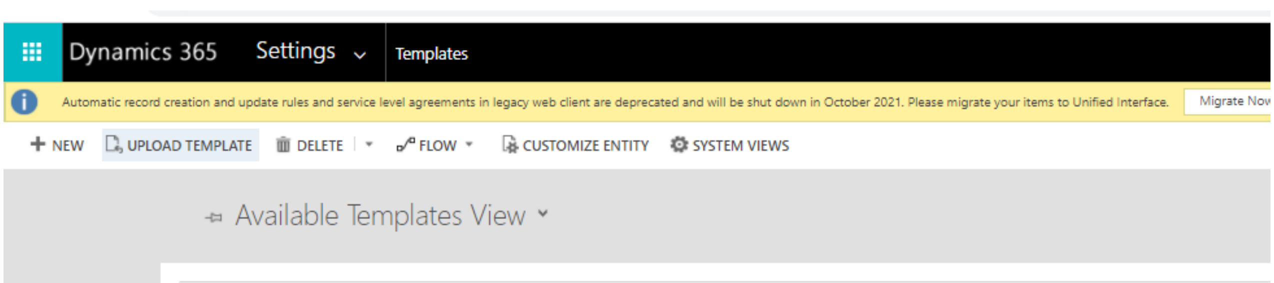


7.6. Step 5: Make the template available to all users

- The steps outlined above have created a Personal MS Word Template which means that only you will see the template and be able to use it. If you would like to make the template available globally to all users within CRM it needs to be uploaded to the global templates list
- Click the gear symbol on the top left of the Menu Bar and choose *Advanced Settings*. This will open up a new tab, (when you have finished you can close this tab to go back to your normal interface)
- Click on the drop-down arrow next to *Settings* and choose *Templates*



- Select *Document Templates*
- On the Command Bar, click on the *Upload Template* button



- Find and select the file for the template you made earlier (the one that you entered the merge fields onto and uploaded)
- Press *Upload*, then *Save & Close* and now all users will be able to access this template