



VetWare

Veterinary software for companion animals



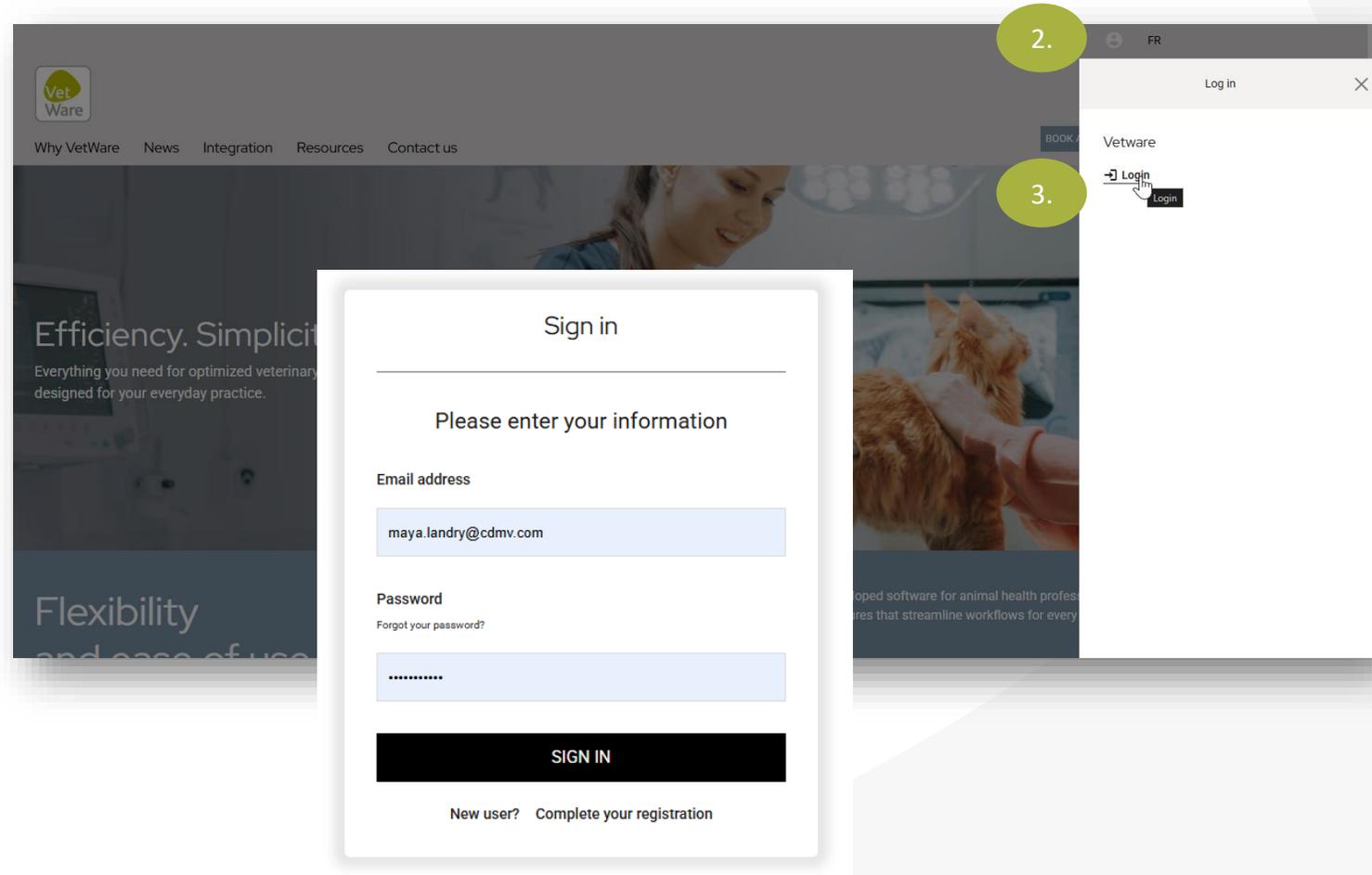
Simplified tutorial – Email template



Solutions Vet

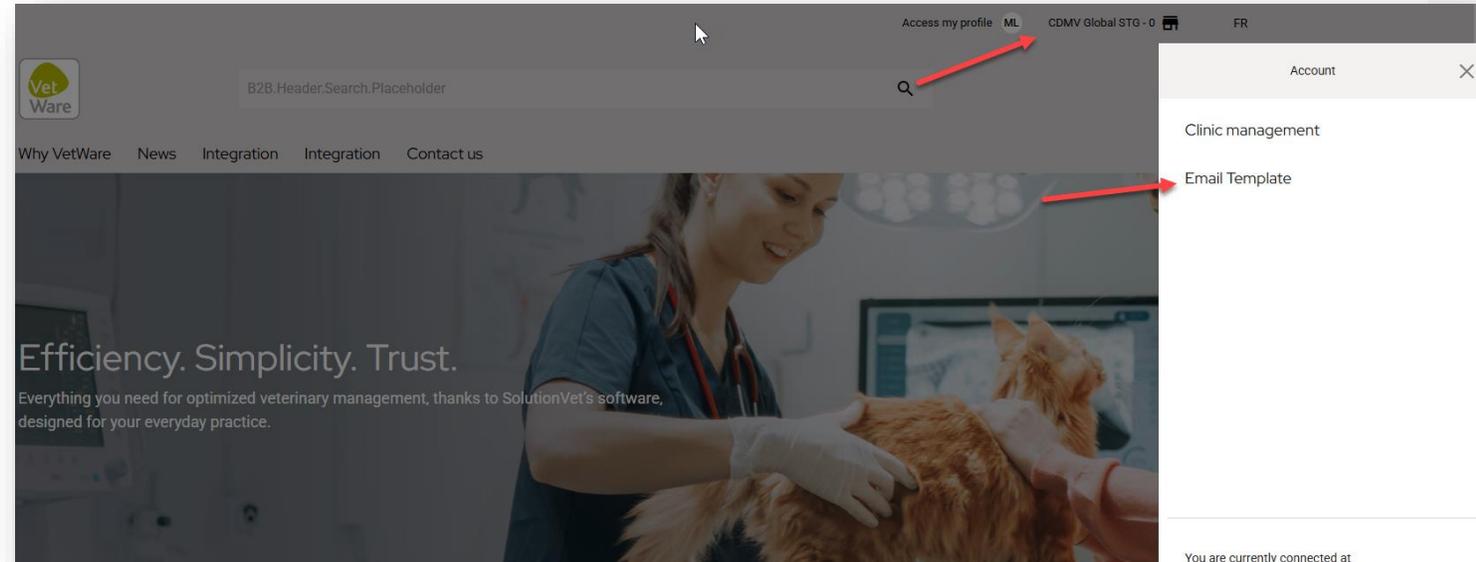
Step 1: Connect to your account

1. Navigate to: vetware.cdmv.com
2. Click on the “Log in” icon located in the top right corner of the page.
3. In the right-hand panel, click on “Login”.
4. Enter your username and password.
5. Click “Sign In” to access your VetWare account.



Step 2: Access the Email template section

1. Go to the “Email Template” section by selecting your organization’s name in the top right of the screen.
2. A panel will open on the right—click on “Email Templates”.



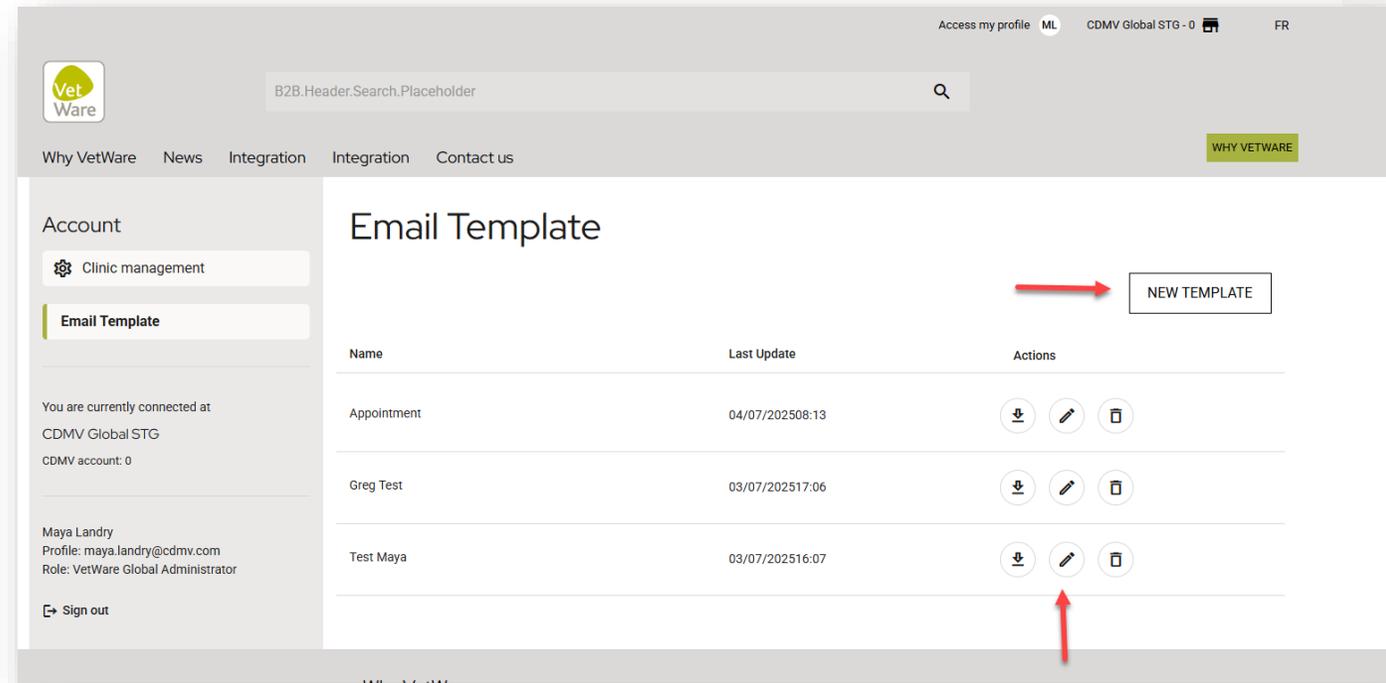
Step 3: Create or edit a template

To create a new template:

- Click on “New Template”.

To edit an existing template:

 Click on the pencil icon next to the desired template.



The screenshot shows the VetWare user interface for managing email templates. At the top right, there are links for 'Access my profile', 'ML', 'CDMV Global STG - 0', and 'FR'. A search bar contains the placeholder text 'B2B.Header.Search.Placeholder'. The navigation menu includes 'Why VetWare', 'News', 'Integration', 'Integration', and 'Contact us'. A 'WHY VETWARE' button is located in the top right corner. On the left sidebar, under the 'Account' section, 'Clinic management' is selected, and 'Email Template' is highlighted. Below this, it shows the user is connected as 'Maya Landry' with the profile 'maya.landry@cdmv.com' and the role 'VetWare Global Administrator'. A 'Sign out' button is at the bottom of the sidebar. The main content area is titled 'Email Template' and contains a table with columns for 'Name', 'Last Update', and 'Actions'. A 'NEW TEMPLATE' button is located to the right of the table. The table lists three templates: 'Appointment', 'Greg Test', and 'Test Maya'. Each row has a download icon, a pencil icon (highlighted with a red arrow), and a trash icon. A red arrow also points to the 'NEW TEMPLATE' button.

Name	Last Update	Actions
Appointment	04/07/202508:13	  
Greg Test	03/07/202517:06	  
Test Maya	03/07/202516:07	  

Step 4: Set template details

1. **Template Name:** Enter a clear and descriptive name.
2. **Language:**
3. Select the language for the email.
4. **Template type:** Choose from the following options:
 - Appointment confirmation
 - Vaccine and visit reminder
 - Parasitic reminder
 - Base template (if none of the above fit your needs)
5. Click “Create” to open the editor

The screenshot shows a 'New Template' form with the following fields and callouts:

- 1.** A text input field for 'Template Name'.
- 2.** A dropdown menu for 'Language' with 'French' selected.
- 3.** A dropdown menu for 'Template Type' with 'Choose a type' selected. The dropdown list is open, showing options: 'Visit and vaccination reminder', 'Parasiticide reminder', 'Base template', and 'Appointment confirmation'.
- 4.** Two buttons at the bottom: a black 'CREATE' button and a white 'CANCEL' button.

Step 5: Customize the email content

In the preview area:

Click on any band (line or block) to edit its content

Watch a short explainer video here: [Watch the video](#)

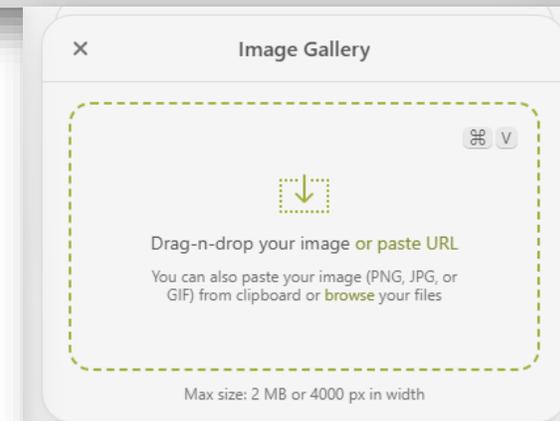
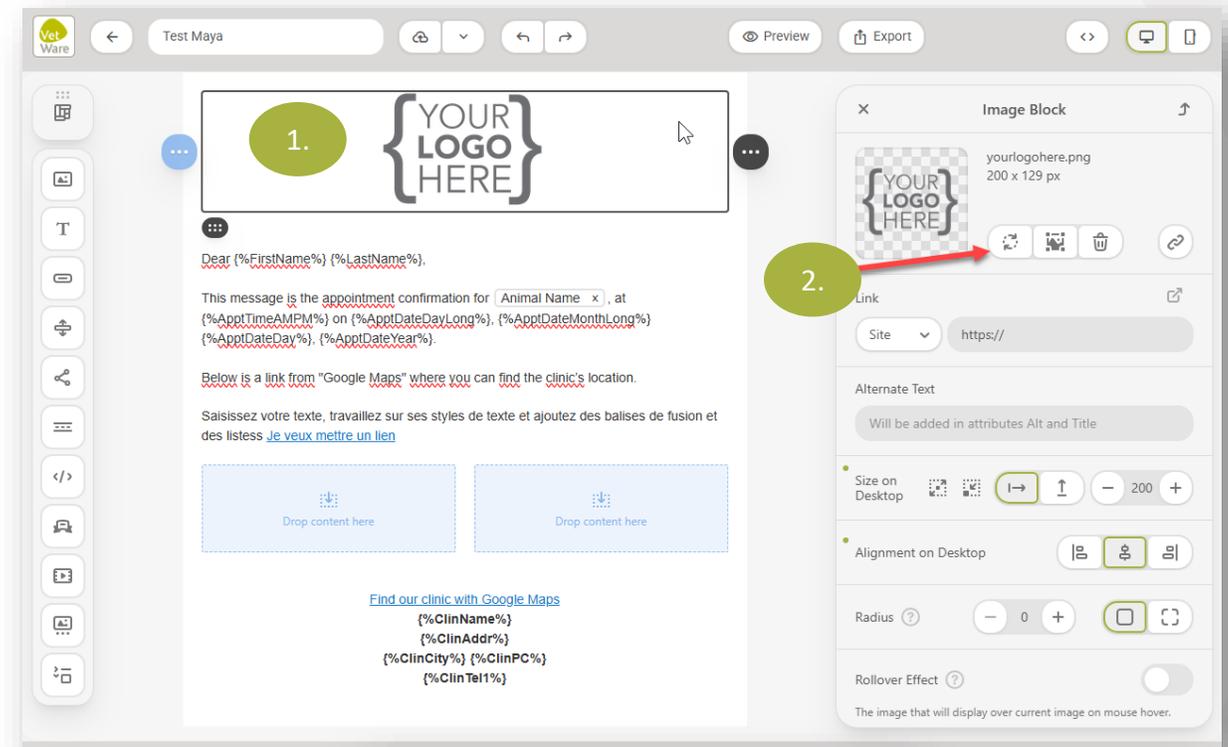
Preview area

The screenshot displays the VetWare email editor interface. At the top, there's a header with the VetWare logo, a search bar containing "Test Maya", and buttons for "Preview" and "Export". The main workspace is divided into three sections: a left sidebar with various editing tools, a central preview area, and a right sidebar with a "Text Block" editor. The preview area shows a draft email with a logo placeholder, a salutation, a main body of text with merge tags, and a link to a Google Maps location. The "Text Block" editor on the right provides options for paragraph style (P, h1-h6), text style (B, I, U, S, X₂, X², T_x), text alignment, indent, insert elements, merge tags, line height, and an anchor link. A green box highlights the text block in the preview area, and a green circle with the number "1" is positioned next to it. A green bracket on the left side of the preview area is labeled "Preview area".

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Step 6: Add your clinic's logo

1. Click on the logo section.
2. In the right-hand panel, click the “Replace Image” icon.
3. Browse your computer and select your logo file.
 - Maximum size: 2MB
 - Maximum width: 4000px



Step 7: Merge tags (Dynamic fields)

Merge tags are codes that automatically insert personalized information into your emails, such as the client's name or their animal's name when the email is sent.

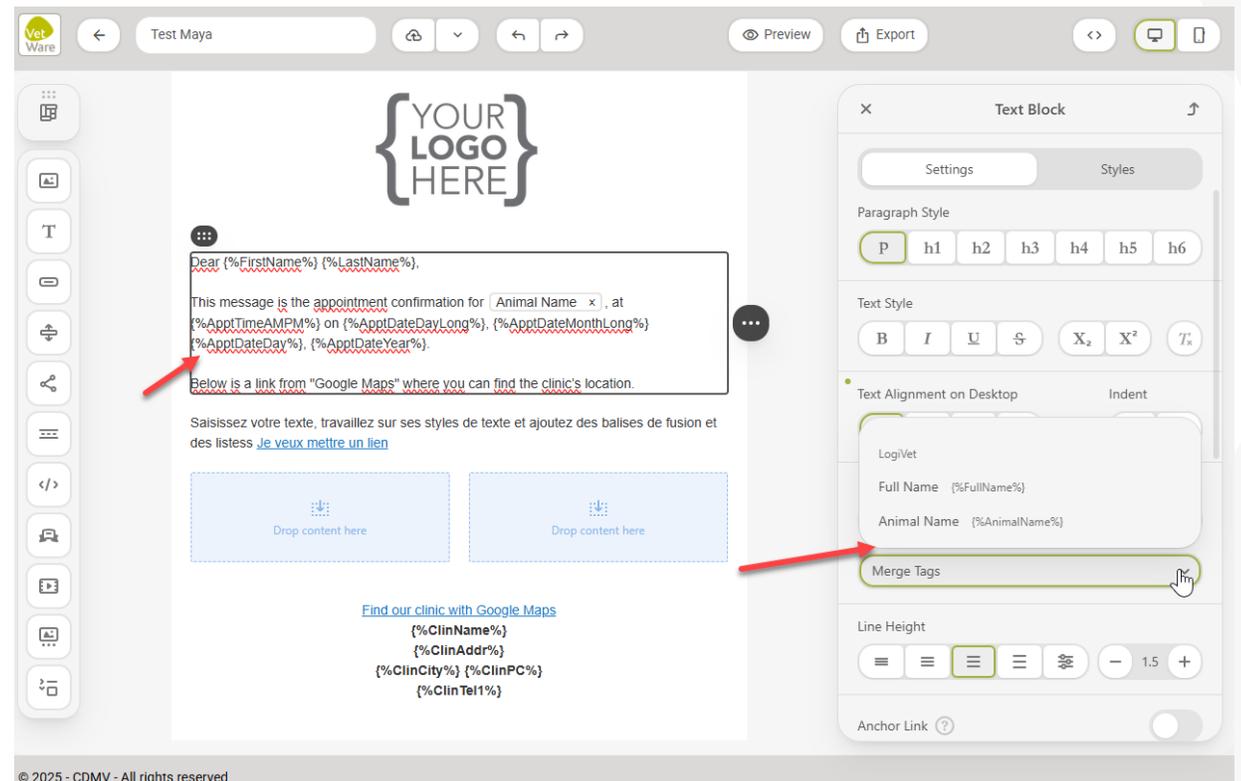
- **Examples:**

- `{%FirstName%}` = First name of the client
- `{%AnimalName%}` = Animal's name

⚠ Important: Use only the tags that are relevant to the type of email you're sending

- **Example:**

- Avoid using the appointment date field in an annual exam reminder if no appointment information is available, as it cannot be replaced with actual data and may cause confusion for the client.



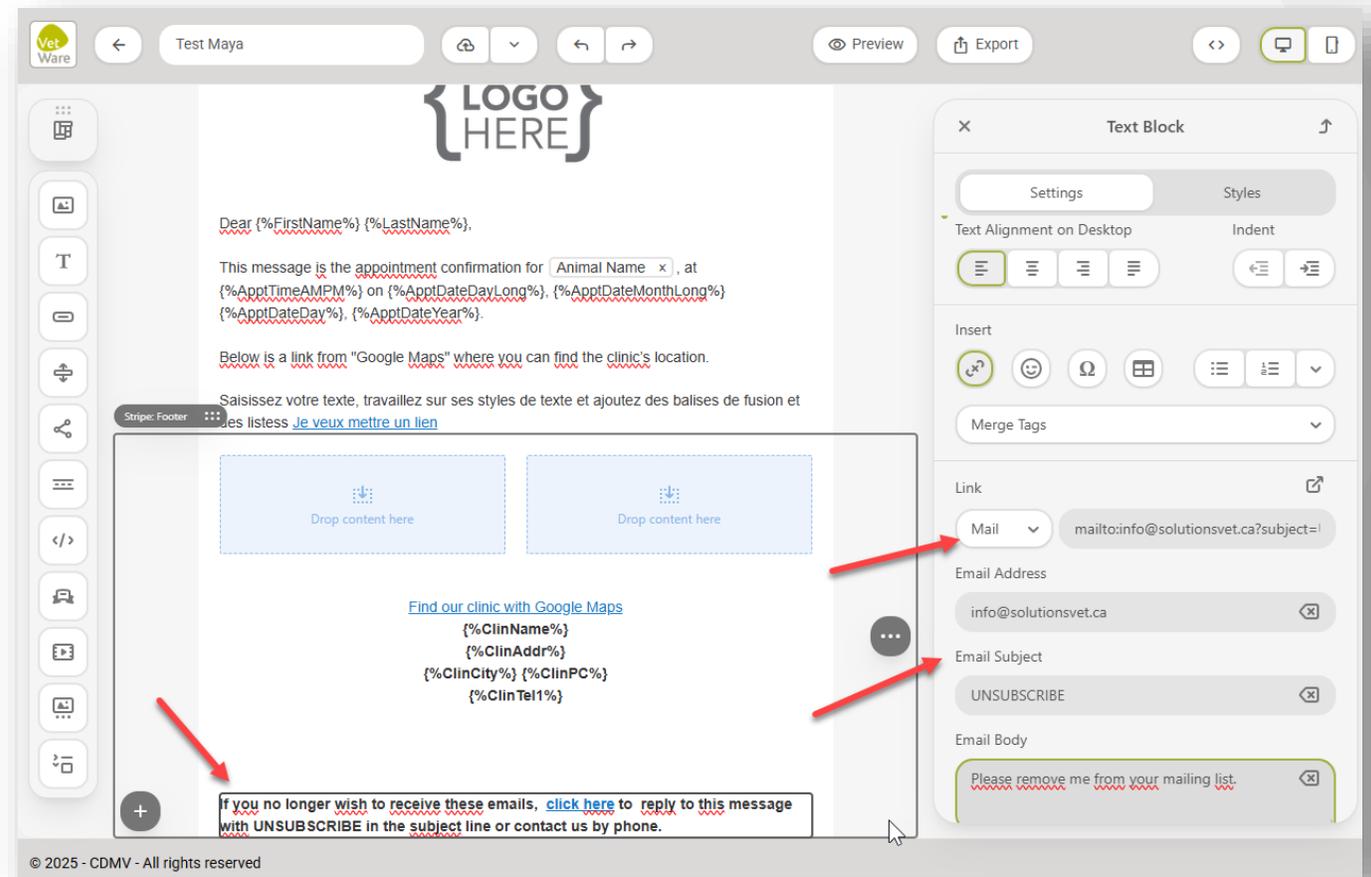
Step 8: Add a footer

Include a footer with an opt-out (unsubscribe) option, as required by law for email communications.

You can also add a **clickable link** to your email to make it easier for recipients to contact you.

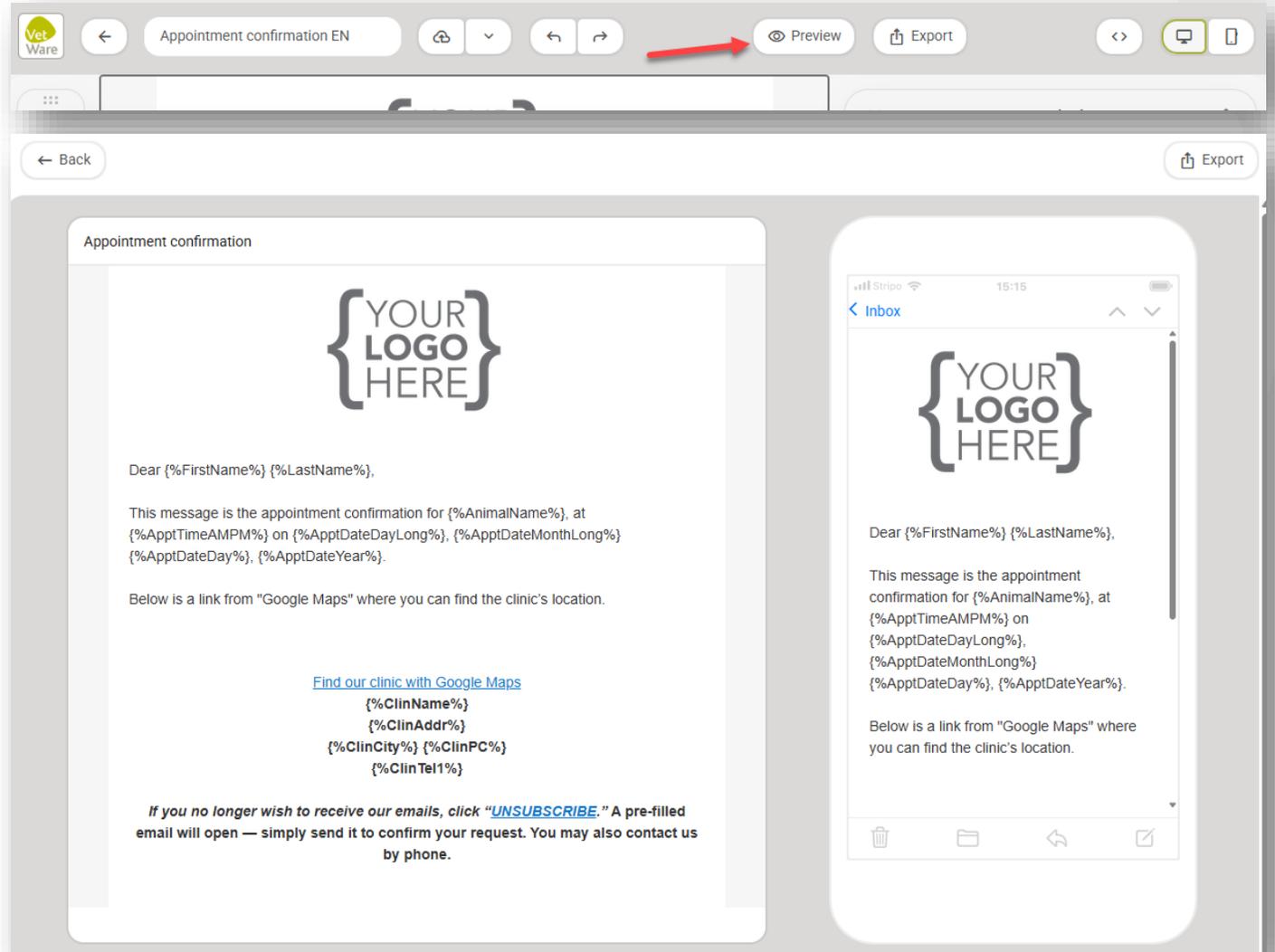
In the preview area:

1. Click in the footer area to edit its content.
2. You can add, edit, or delete text directly within the content areas



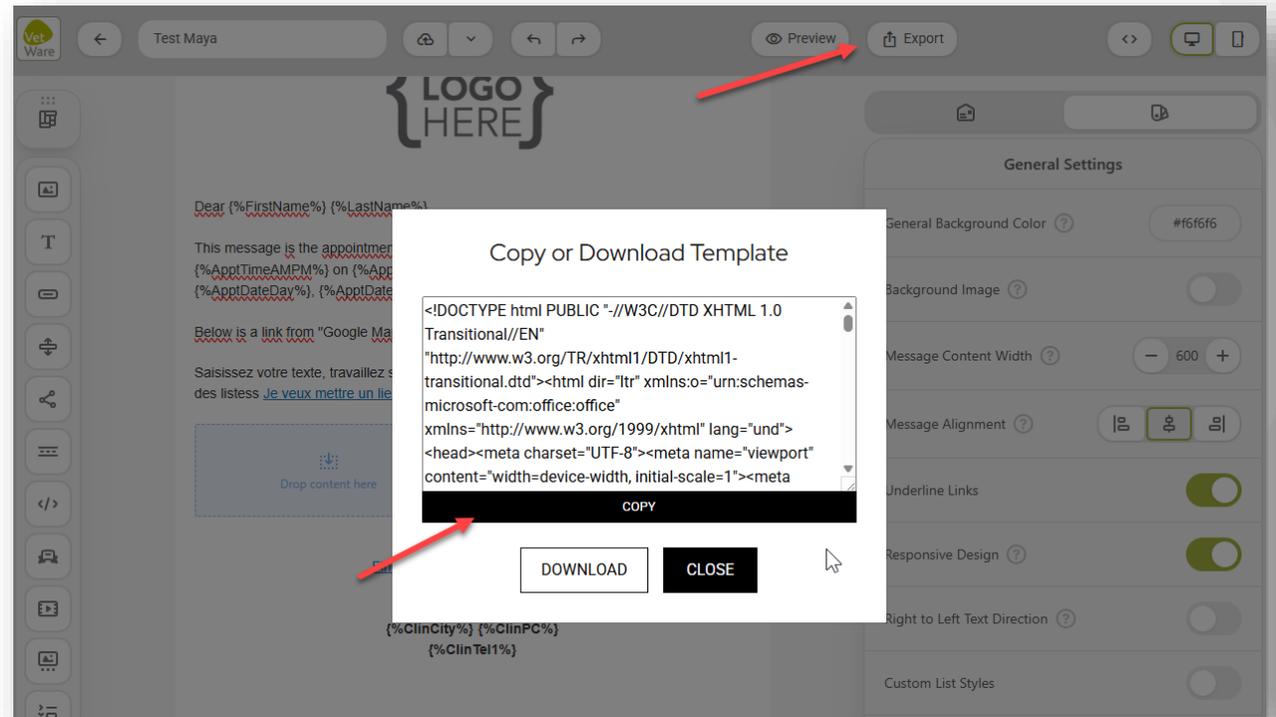
Step 9: Preview the template

Click “Preview” to view how the email will appear on desktop or mobile



Step 10: Export and integrate the template in VetWare

1. Once everything is ready, select “Export”.
2. Click “Copy”.
3. Open VetWare.
4. Go to the “Email templates” section, then paste the copied content.



Thank you!

Technical support:

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