VetWare

Veterinary software for companion animals
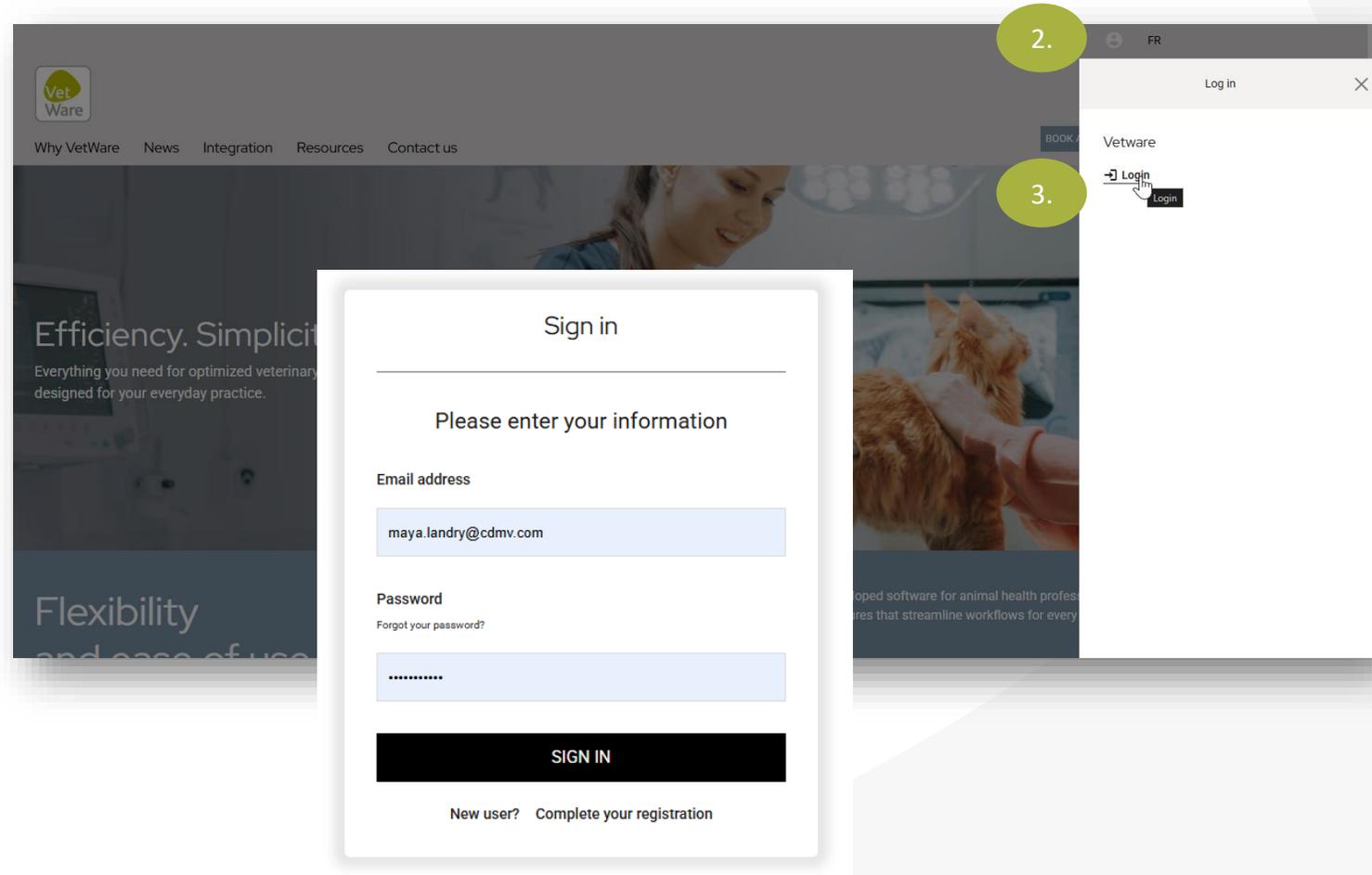
## Simplified tutorial – Email template

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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.

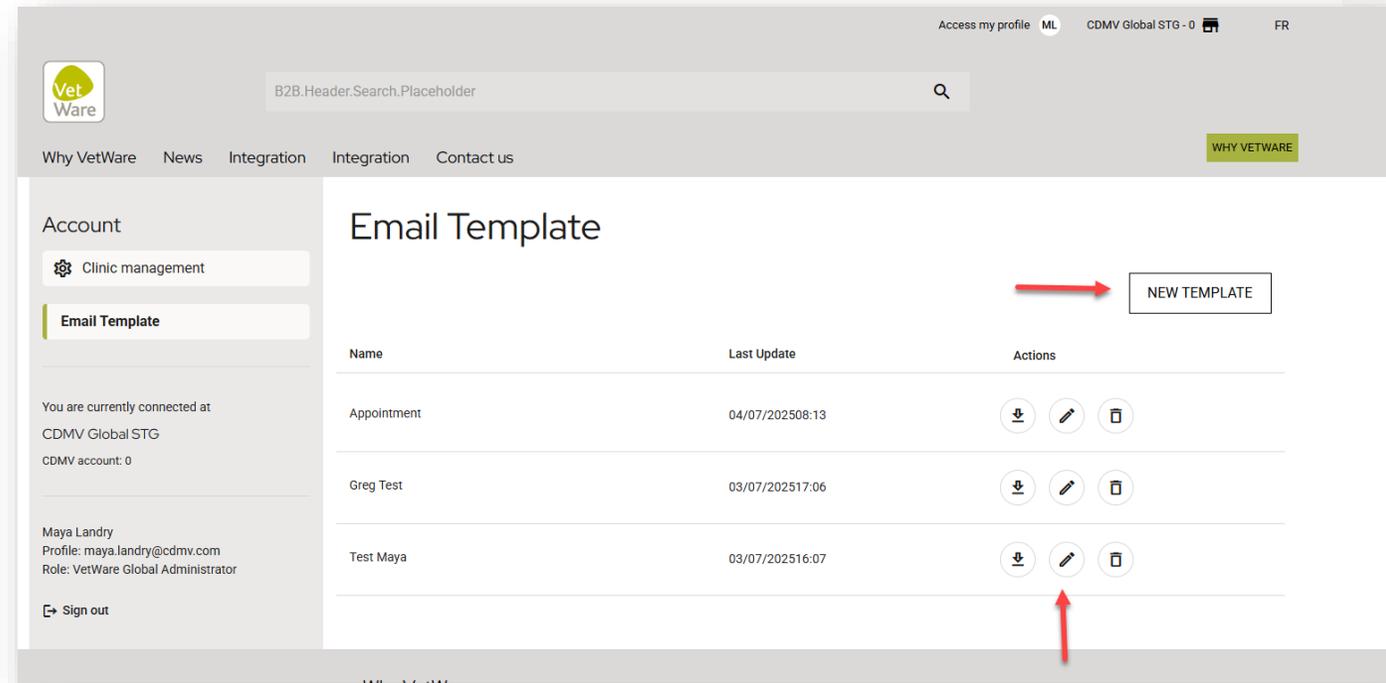2. A panel will open on the right—click on "Email Templates".

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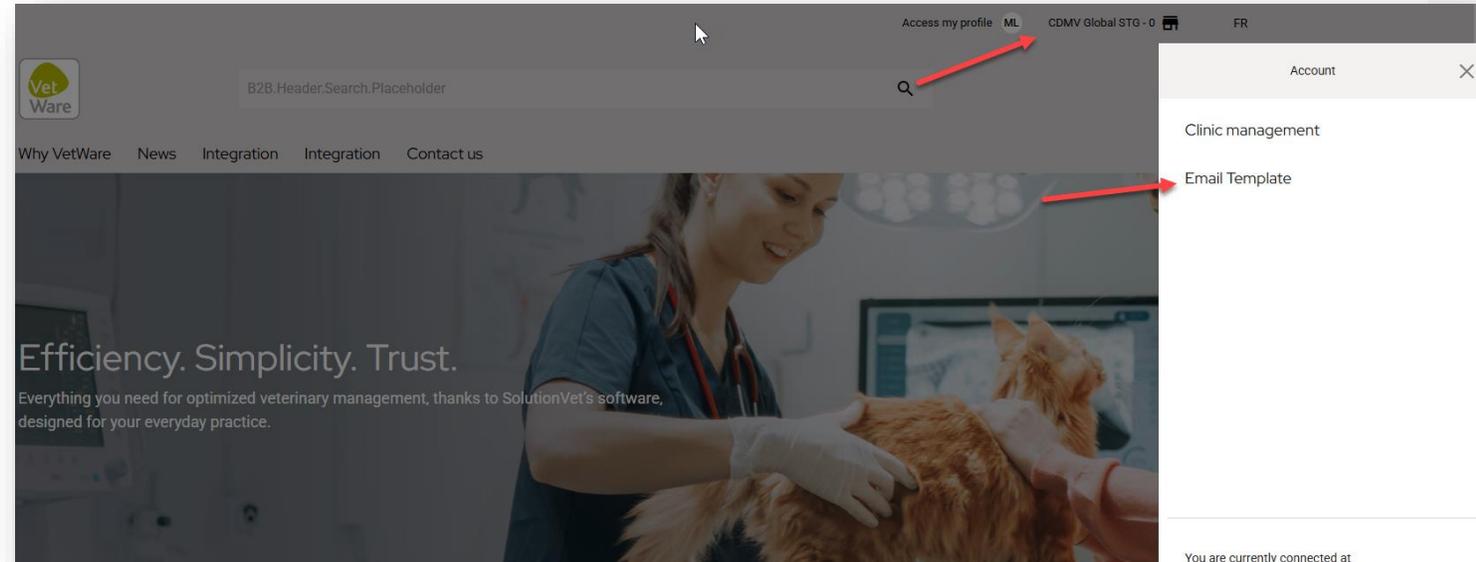
Step 3: Create or edit a template

To create a new template:

- Click on "New Template".

To edit an existing template:

Click on the pencil icon next to the desired template.

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

New Template

Template Name

1.

Language

2. French

Template Type

3. Choose a type

Visit and vaccination reminder
Parasiticide reminder
Base template
Appointment confirmation

4. CREATE   CANCEL

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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

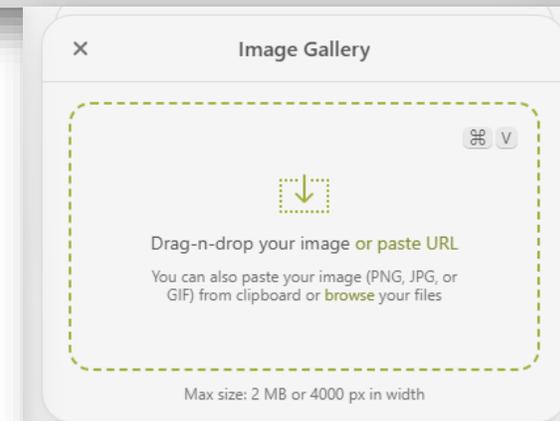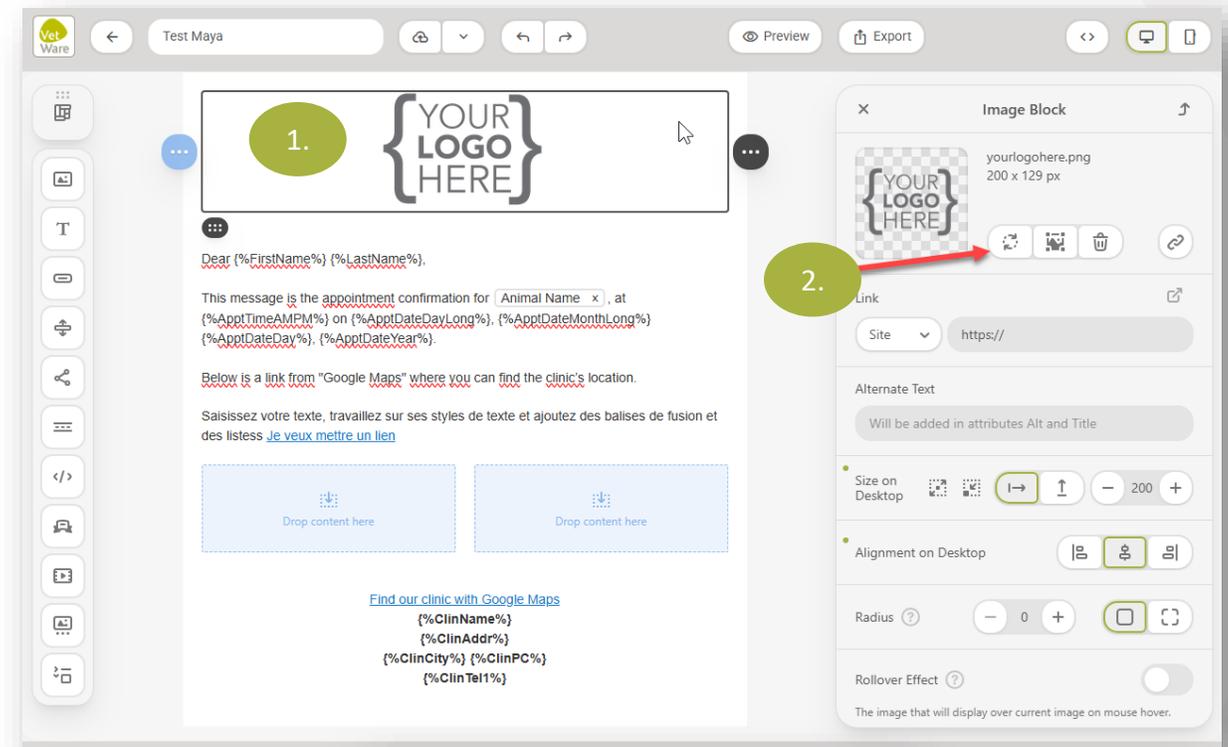Preview area

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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.
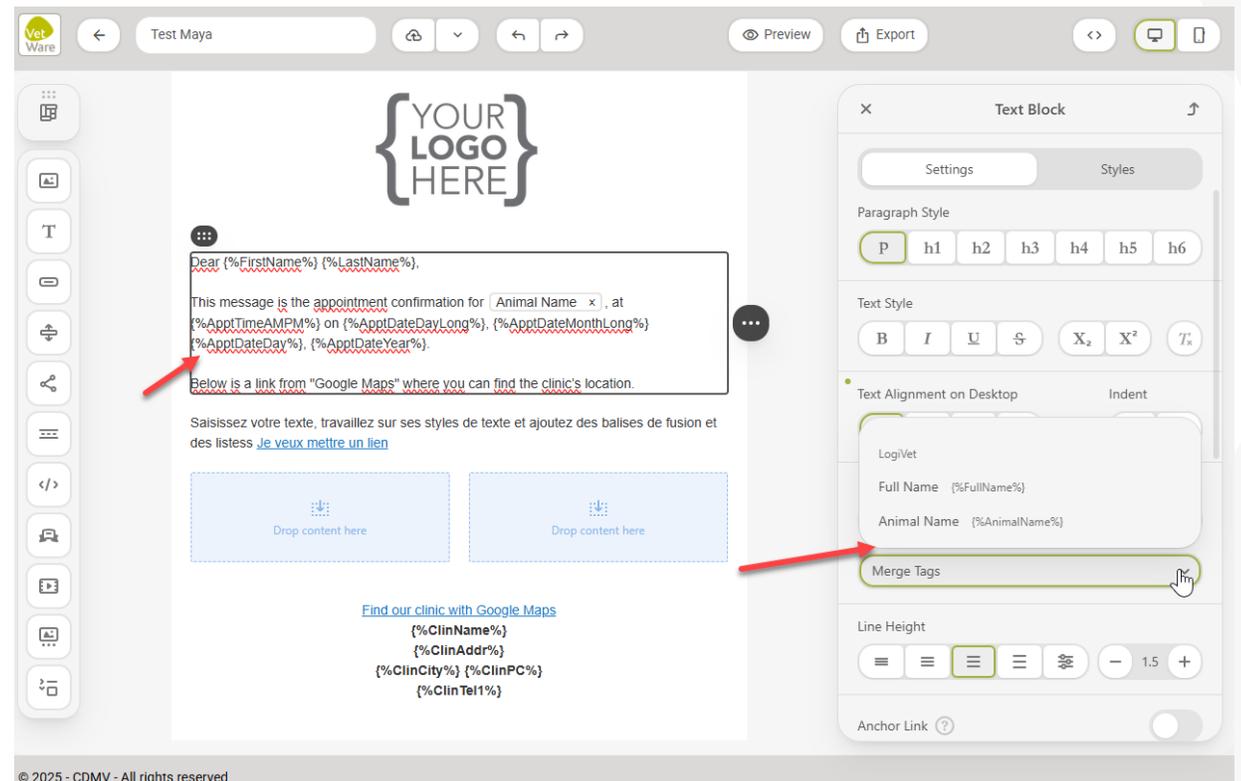
- **Examples**:

  - {%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.
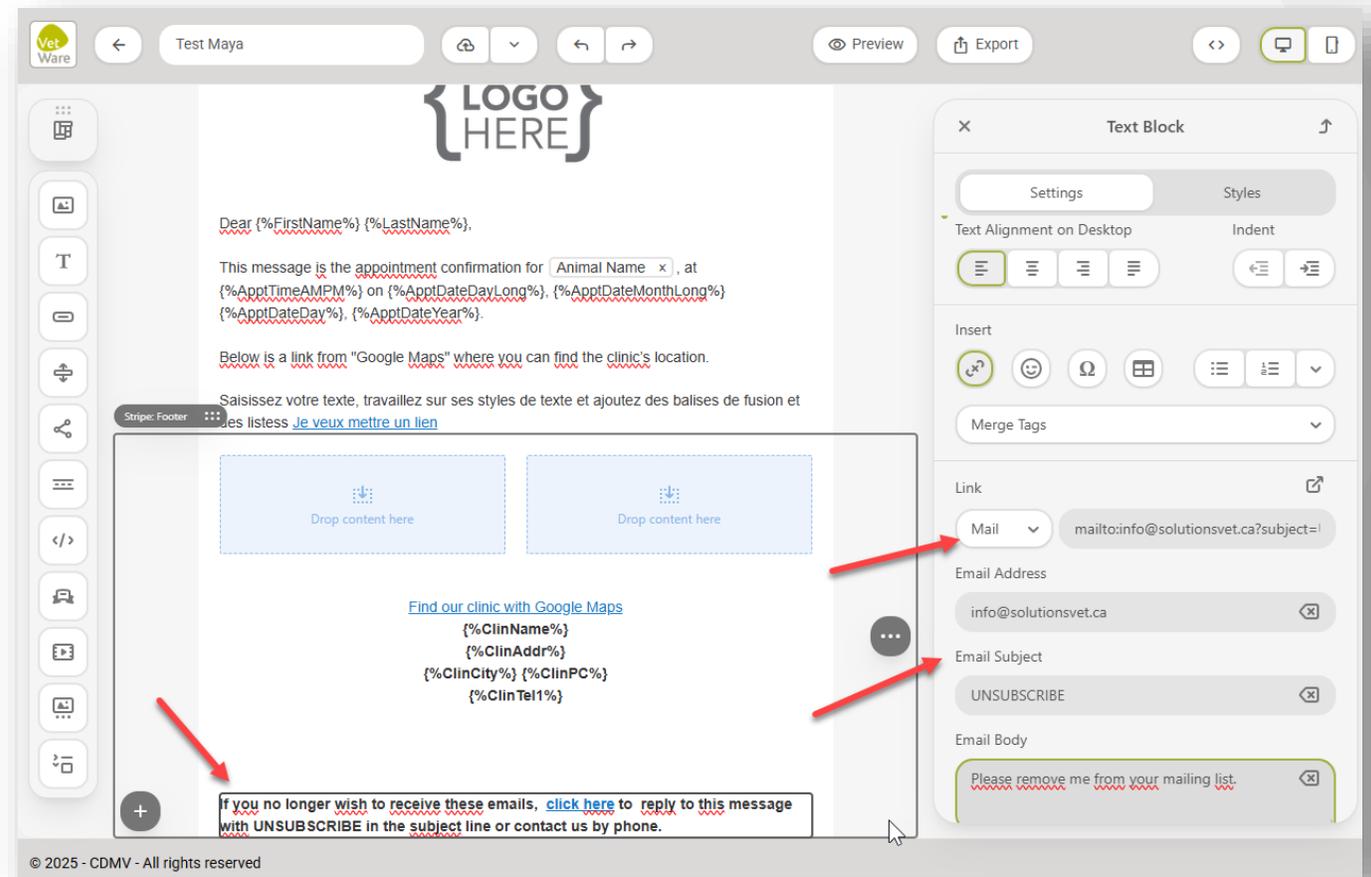
Step 8: Add a footer

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.
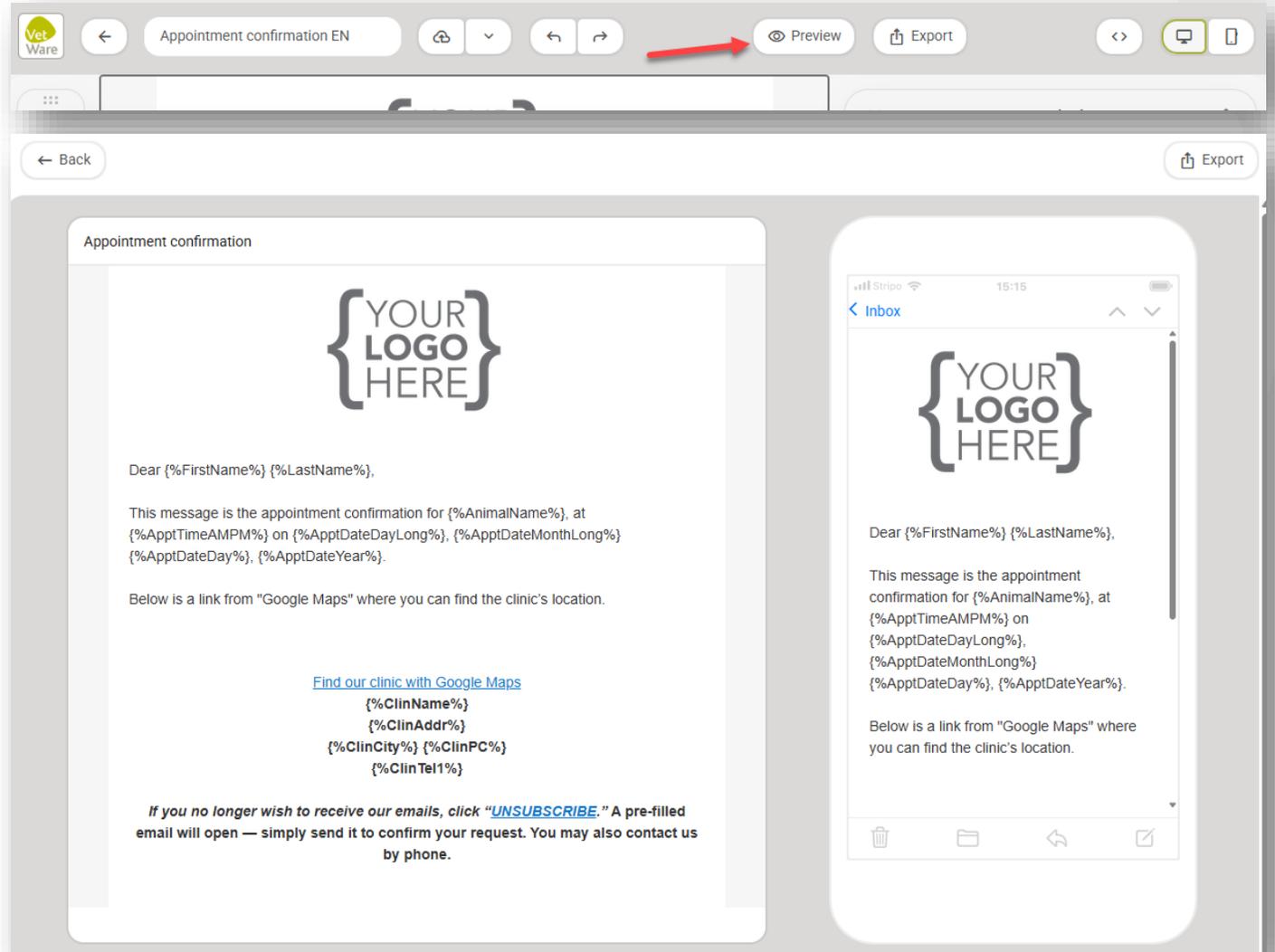
In the preview area:

1. Click in the footer area to edit its content.

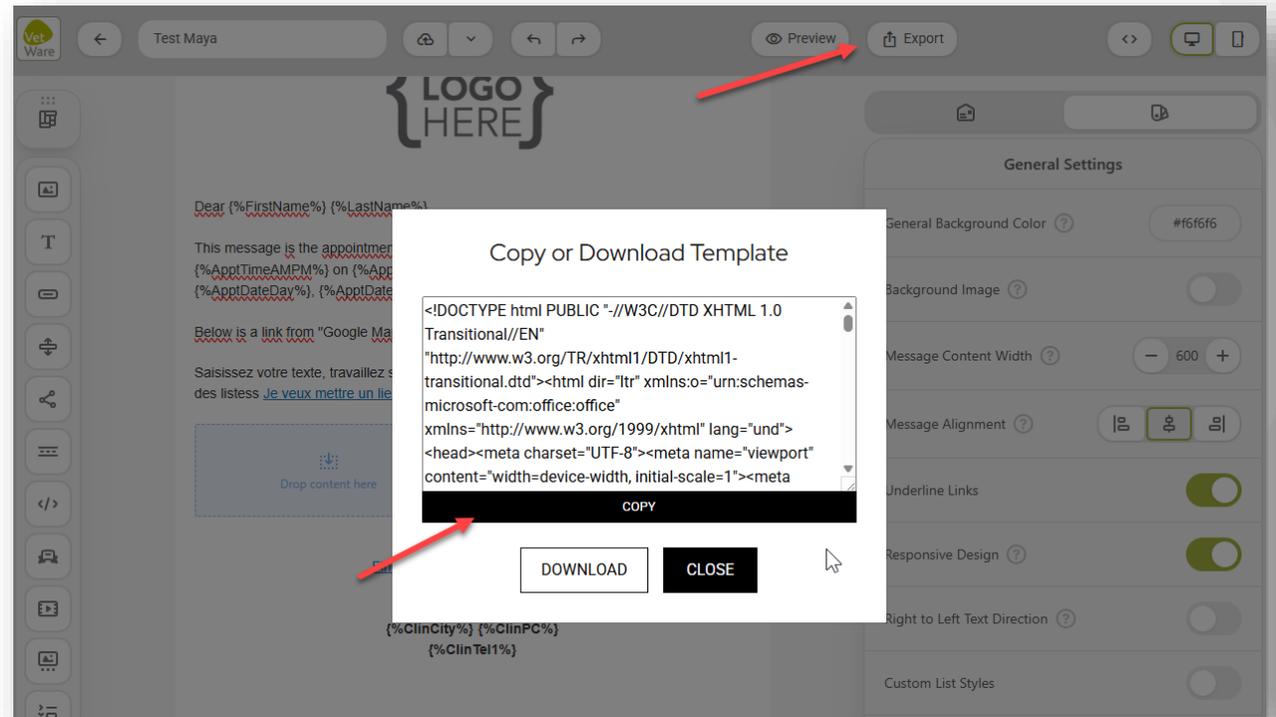2. You can add, edit, or delete text directly within the content areas

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.

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Thank you!

Technical support:

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info@solutionsvet.ca