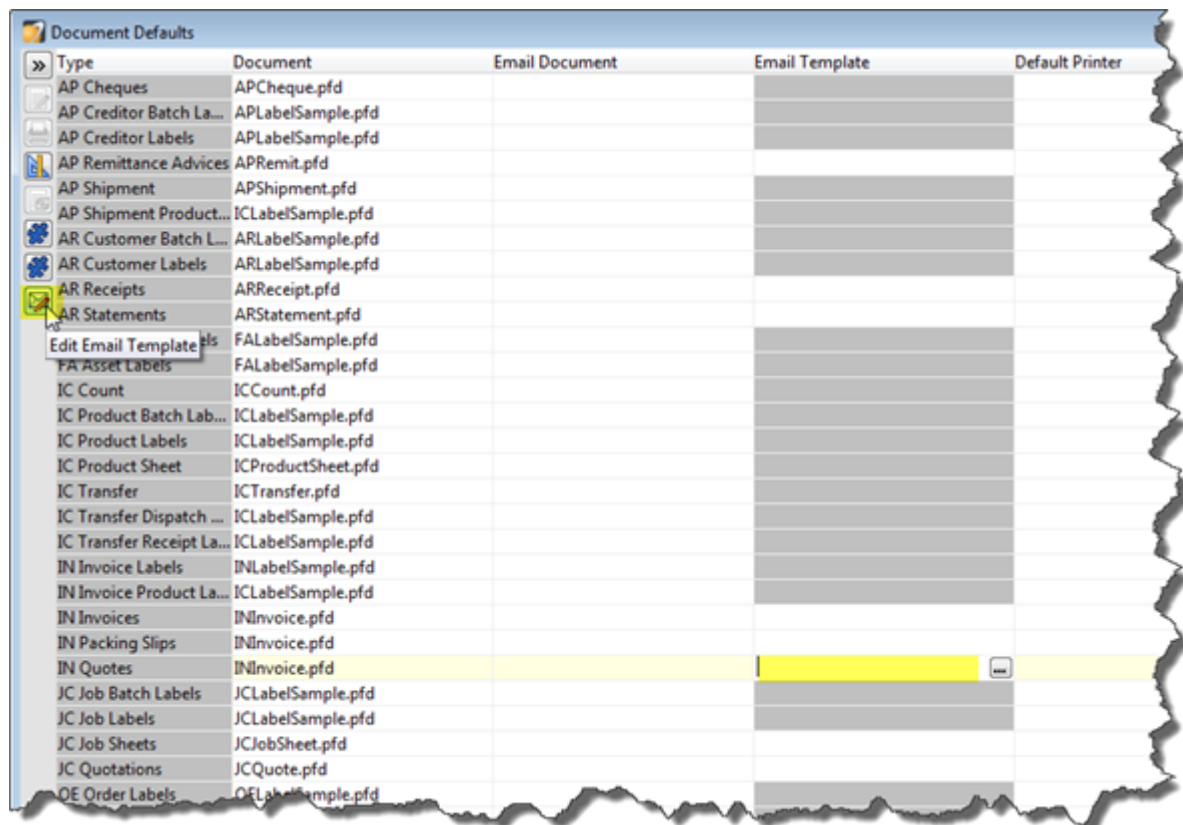# Email Templates for Documents

In Accredo 4 you can set default Email Templates per Document, allowing you to decide on the Attachment name, the Subject and body of the Email based on the type of Document you are emailing. Sample Templates are supplied which can be used as they are or modified to suit.

How to assign an Email Template to an INQuote

Go to Setup > Company > Reporting > Document Defaults, click **Edit** then click in the Email Template Field for IN Quotes. Click the **Edit Email Template** button to open the Invoice Email Designer. (You can also access the Invoice Email Designer from Setup > Invoicing System > Invoice Email Designer.)

Type	Document	Email Document	Email Template	Default Printer
AP Cheques	APCheque.pfd			
AP Creditor Batch La...	APLabelSample.pfd			
AP Creditor Labels	APLabelSample.pfd			
AP Remittance Advices	APRemit.pfd			
AP Shipment	APShipment.pfd			
AP Shipment Product...	ICLabelSample.pfd			
AR Customer Batch L...	ARLabelSample.pfd			
AR Customer Labels	ARLabelSample.pfd			
AR Receipts	ARReceipt.pfd			
AR Statements	ARStatement.pfd			
Edit Email Template ls	FALabelSample.pfd			
FA Asset Labels	FALabelSample.pfd			
IC Count	ICCount.pfd			
IC Product Batch Lab...	ICLabelSample.pfd			
IC Product Labels	ICLabelSample.pfd			
IC Product Sheet	ICProductSheet.pfd			
IC Transfer	ICTransfer.pfd			
IC Transfer Dispatch ...	ICLabelSample.pfd			
IC Transfer Receipt La...	ICLabelSample.pfd			
IN Invoice Labels	INLabelSample.pfd			
IN Invoice Product La...	ICLabelSample.pfd			
IN Invoices	INInvoice.pfd			
IN Packing Slips	INInvoice.pfd			
IN Quotes	INInvoice.pfd			
JC Job Batch Labels	JCLabelSample.pfd			
JC Job Labels	JCLabelSample.pfd			
JC Job Sheets	JCJobSheet.pfd			
JC Quotations	JCQuote.pfd			
OE Order Labels	OELabelSample.pfd			

Accredo
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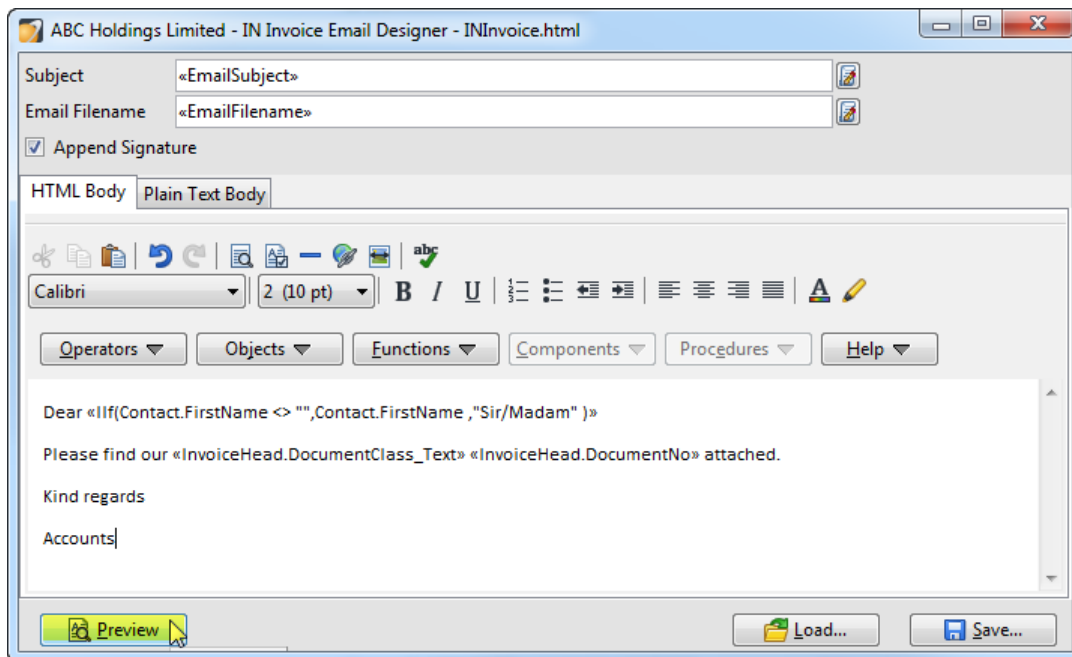The IN Invoice Email Designer opens. Click **Load**.
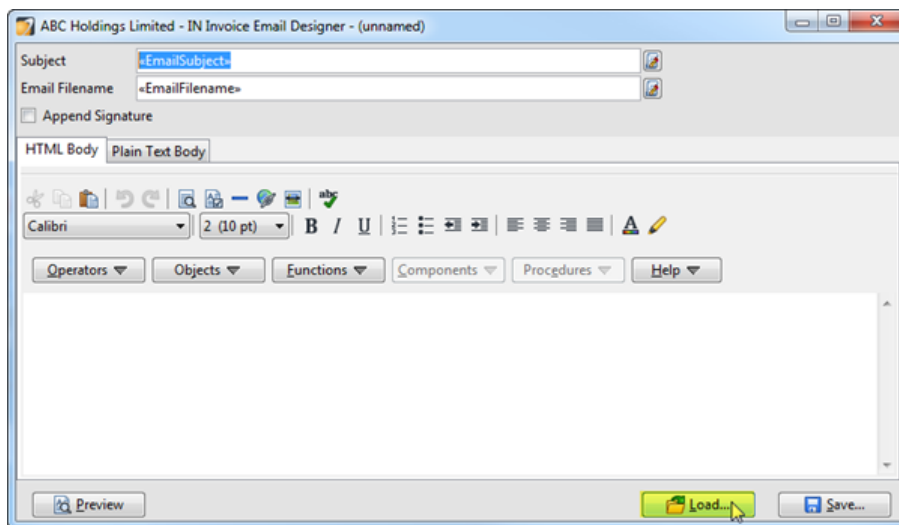
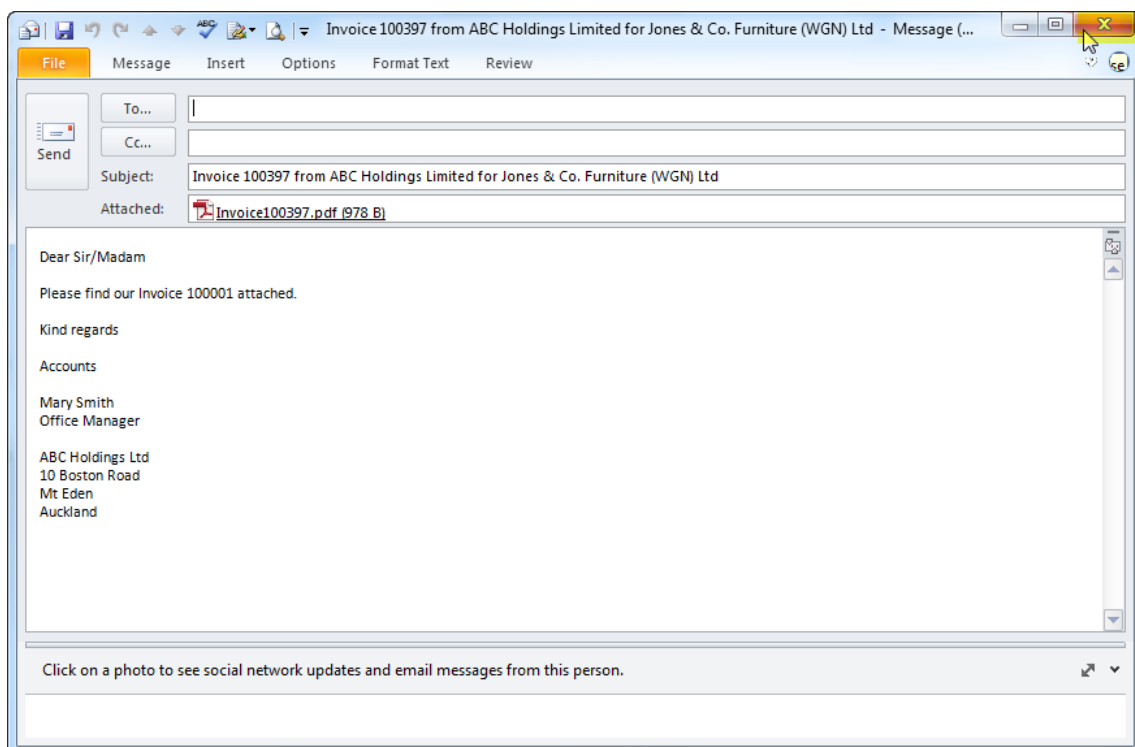Select the INInvoice.html and click **Open**.
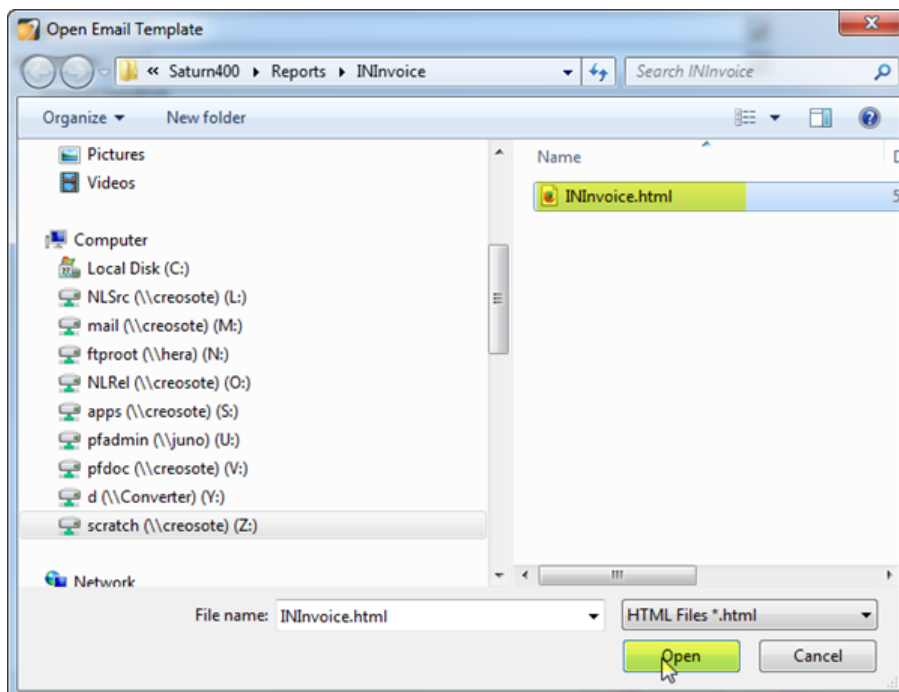
The Default Template will load. The Expressions in the Subject and Email Filename fields contain code to default to the Subject and Filename Accredo generates automatically.

Click **Preview** to see what the Email will look like from the Template.

A sample email is created with a dummy file attached. Close the email.

SUBJECT - You can change the Expression for the subject if you wish. There is a Code Editor you can click to help you build or edit the Expression. Expressions must be encased with << and >> and these are accessible from the Operators drop down. In the example below I have modified the expression to replace the word 'Quote' with 'Estimate' in the email Subject when a Quote is emailed.

EMAIL FILENAME - You can also change the file name. There is a Code Editor you can click to help you build or edit the Expression. Expressions must be encased with << and >> and these are accessible from the Operators drop down. In the example below I have modified the expression to replace the word 'Quote' with 'Estimate' in the Email Filename when a Quote is emailed.

APPEND SIGNATURE - Leave this ticked if you have your own User Signature and/or Company Signature that you would like included on the bottom of the email. This will mean that when a User emails the Document, their User signature will be used.

HTML BODY - This is where the message is typed. You can also use the Operators, Objects and Functions to access fields and build or edit the Expressions.

I have modified the Expression so that it refers to 'Estimate' rather than Quote when a Quote is emailed. I have also added some extra text and removed the valediction.
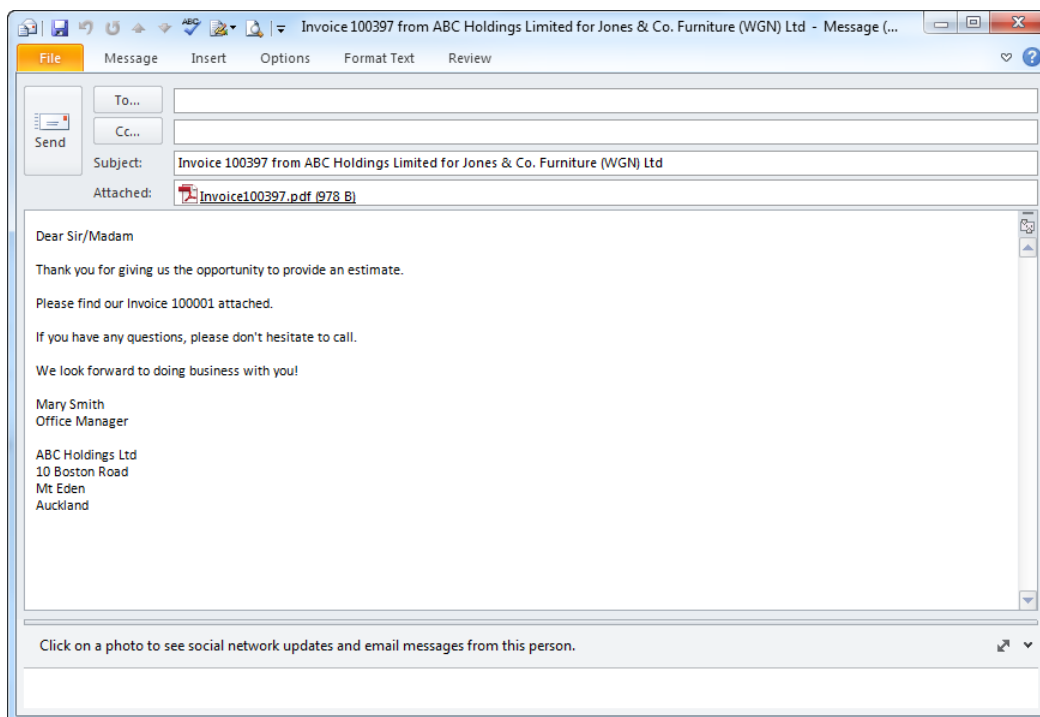
Note: If you are batch emailing and consolidating emails, you may want to change the expressions so they do not refer to a specific document.
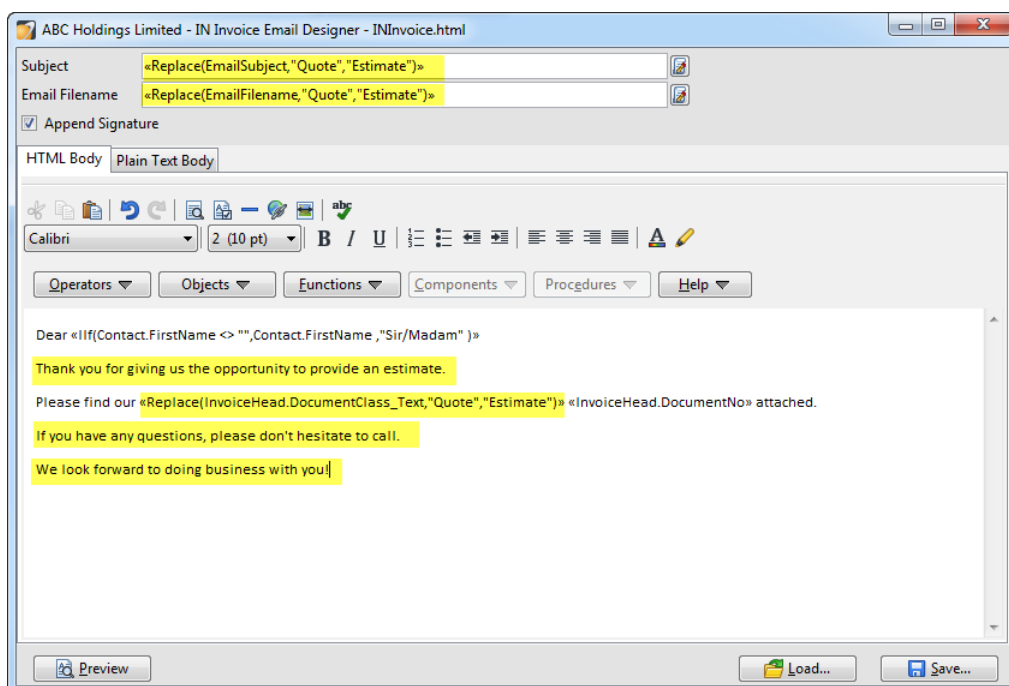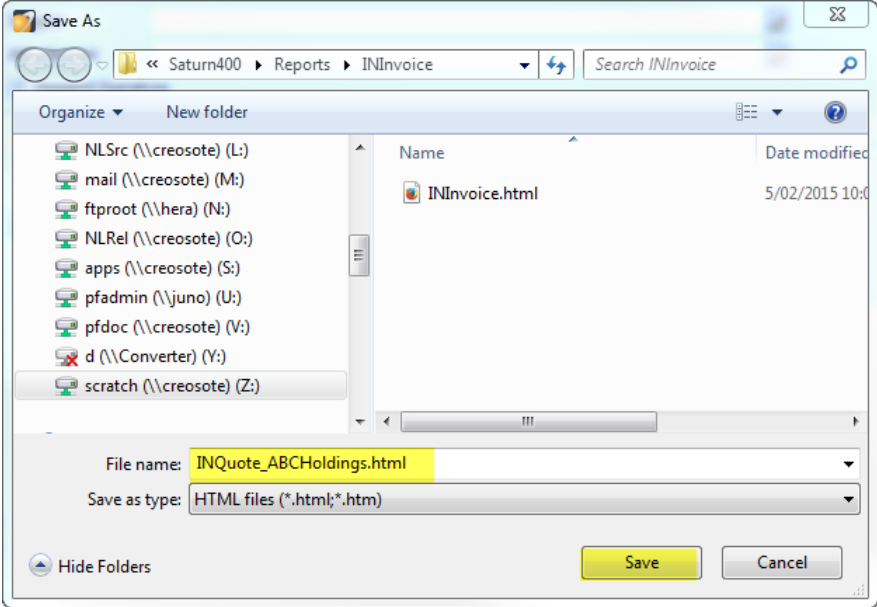
Select **Preview** again to make sure you are happy with the email result.

Note: Because the preview is tested on Invoices the results of the expressions won't change in the Preview.
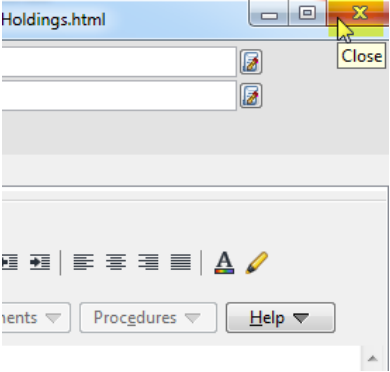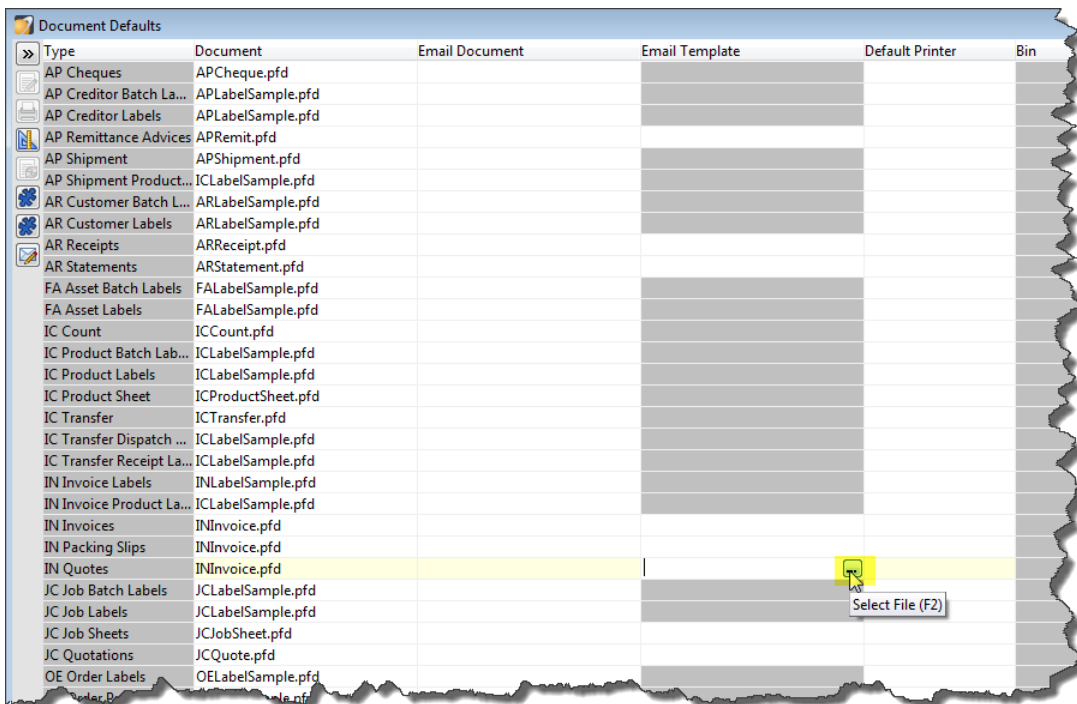
Close the email.

Select **Save** and save the Email Template with a different file name so that it will not be overwritten by future server installs.
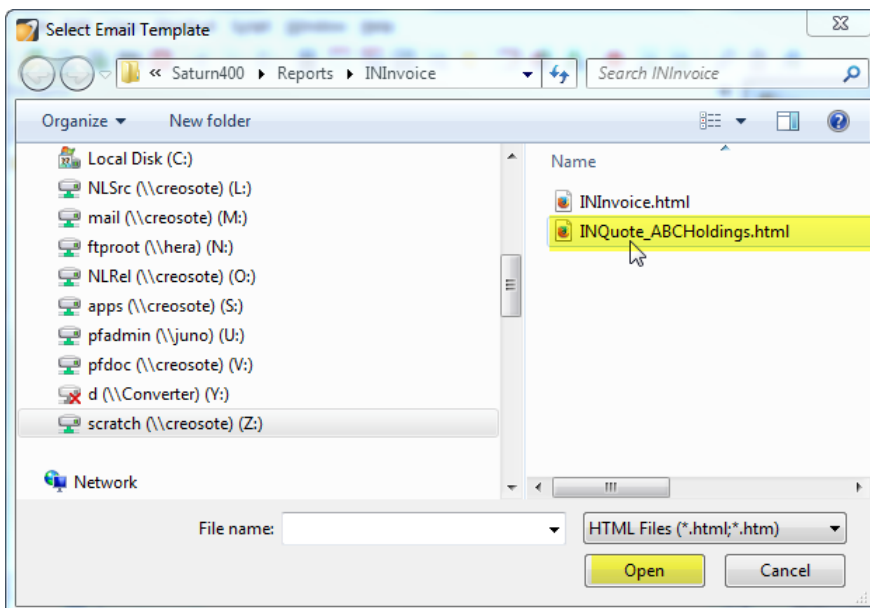

Close the Invoice Template.

Then click the **Select File** button in the Email Template field.

Select your Email Template and click **Open.**

Your Email Template will display in the Grid.

Move off the field and then close the Document Defaults.

The next time you Print a Quote…

... and select Mail Message in the Destination, the default Email Template will be selected.
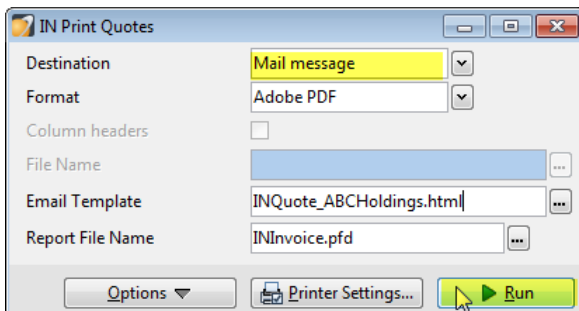
Then when you select Run, your Email will be created from your template.