Tips & Tricks

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.)

fype	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			
dit Email Template	FALabelSample.pfd			
A Asset Labels	FALabelSample.pfd			
C Count	ICCount.pfd			
C Product Batch Lab	ICLabelSample.pfd			
C Product Labels	ICLabelSample.pfd			
C Product Sheet	ICProductSheet.pfd			
C Transfer	ICTransfer.pfd			
C Transfer Dispatch	ICLabelSample.pfd			
C Transfer Receipt La	ICLabelSample.pfd			
N Invoice Labels	INLabelSample.pfd			
N Invoice Product La	ICLabelSample.pfd			
N Invoices	INInvoice.pfd			
N Packing Slips	INInvoice.pfd			
N Quotes	INInvoice.pfd			
C Job Batch Labels	JCLabelSample.pfd			
C Job Labels	JCLabelSample.pfd			
C Job Sheets	JCJobSheet.pfd			
C Quotations	JCQuote.pfd			



The IN Invoice Email Designer opens. Click Load.

🌍 ABC Holdings l	imited - IN Invoice Email Designer - (unnamed)	
Subject	•EmailSubject-	
Email Filename	«EmailFilename»	
Append Signat	ure	
HTML Body Plai	n Text Body	
Calibri Qperators ▼	C C B − F = F 2 (10 pt) ▼ B / U 5 = 1 = 1 E = = A / Objects ▼ Functions ▼ Components ▼ Procedures ▼ Help ▼	~
Preview	Load	Save

Select the INInvoice.html and click Open.

🧊 Open Email Template	×
Saturn400 > Reports > INInvoice	- 4 Search INInvoice
Organize - New folder	8= - 1
E Pictures	^ Name D
Videos 🗧	INInvoice.html 5
🖳 Computer	
🚰 Local Disk (C:)	
🖵 NLSrc (\\creosote) (L:)	E
🖵 mail (\\creosote) (M:)	
🖵 ftproot (\\hera) (N:)	
P NLRel (\\creosote) (O:)	
🛫 apps (\\creosote) (S:)	
🛫 pfadmin (\\juno) (U:)	
🖵 pfdoc (\\creosote) (V:)	
d (\\Converter) (Y:)	
🚽 scratch (\\creosote) (Z:)	
Sa Network	• • • III •
File name: INInvoice.html	✓ HTML Files *.html ▼
	Rpen Cancel

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.

MBC Holdings L	imited - IN Invoice Email Designer - INInvoice.html	
Subject	«EmailSubject»	
Email Filename	«EmailFilename»	
Append Signate	ure	
HTML Body Plai	n Text Body	
* F 🗈 🎾		
Calibri	▼ 2 (10 pt) ▼ B / U 3 = = ■ ■ = ■ ■ ▲ /	
Operators 🗢	Objects ▼ Eunctions ▼ Components ▼ Procedures ▼ Help ▼	
Dear «IIf(Contac	t.FirstName <> "",Contact.FirstName ,"Sir/Madam")»	•
Please find our	«InvoiceHead.DocumentClass_Text» «InvoiceHead.DocumentNo» attached.	
Kind regards		
Accounts		
		-
Preview	🚰 Load 🔚 Save]

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

File			
File	Message	Insert Options Format Text Review	ی « <mark>بو</mark>)
Send	Cc		
	Subject: Attached:	Invoice 100397 from ABC Holdings Limited for Jones & Co. Furniture (WGN) Ltd Finvoice100397.pdf (978 B)	
Dear Sir,			
Please fi	ind our Invoice	100001 attached.	
Kind reg			
Mary Sm Office N			
ABC Hol	dings Ltd		
10 Bosto Mt Eden Auckland	1		
Click or	n a photo to s	ee social network updates and email messages from this person.	2 4

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.

🏹 ABC Holdings	Limited - IN Invoice Email Designer - INInvoice.html	
Subject	«Replace(EmailSubject, "Quote", "Estimate")»	
Email Filename	«Replace(EmailFilename, "Quote", "Estimate")»	
Append Signa	ture	
HTML Body Pla	ain Text Body	
	• 2 (10 pt) • B / U ≟ ≟ ± ± ≡ ↓ ≡ ≡ ≡ ▲ /	
Dear «IIf(Conta		*
Thank you for g	iving us the opportunity to provide an estimate.	
Please find ou	<pre>«Replace(InvoiceHead.DocumentClass_Text,"Quote","Estimate")» «InvoiceHead.DocumentNo» attached.</pre>	
If you have any	questions, please don't hesitate to call.	
We look forwa	rd to doing business with you!	
		Ŧ
🔀 Preview	🔁 Load	Save

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.

😰 🛃	9 5 4 4	🖂 🥙 🌛 🗣 🗋 📮 Invoice 100397 from ABC Holdings Limited for Jones & Co. Furniture (WGN) Ltd - Message (
File	Message	Insert Options Format Text Review	∞ 🕜
Send	To Cc		
	Subject:	Invoice 100397 from ABC Holdings Limited for Jones & Co. Furniture (WGN) Ltd	
	Attached:	1 Invoice100397.pdf (978 B)	
	r/Madam /ou for giving u	s the opportunity to provide an estimate.	
Please t	find our Invoice	100001 attached.	
		ons, please don't hesitate to call.	
We lool	k forward to do	ing business with you!	
Mary Sr Office M	mith Manager		
			V
Click o	on a photo to :	see social network updates and email messages from this person.	k <u>4</u> ∧

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

🌍 Save As		<u> </u>
Saturn400 > Reports	► INInvoice Search INInvoice	Q
Organize 🔻 New folder		! ∷
🚅 NLSrc (\\creosote) (L:)	^ Name	Date modified
🖵 mail (\\creosote) (M:)	INInvoice.html	5/02/2015 10:0
🖵 ftproot (\\hera) (N:)		
🖵 NLRel (\\creosote) (O:)	Ξ	
🚽 apps (\\creosote) (S:)		
🖵 pfadmin (\\juno) (U:)		
🖵 pfdoc (\\creosote) (V:)		
🙀 d (\\Converter) (Y:)		
🚅 scratch (\\creosote) (Z:)		
-	▼ <	Þ
File name: INQuote_ABCHold	lings.html	•
Save as type: HTML files (*.html	*.htm)	•
Alide Folders	Save	Cancel

Close the Invoice Template.

Holdings.html	_ 0	×
		Close
▋▋ ⋿⋷⋷≡	<u>A</u> 🖉	
nents ≂ Proc <u>e</u> dures ≂	<u>H</u> elp ▼	
		*

Then click the $\ensuremath{\textbf{Select}}$ $\ensuremath{\textbf{File}}$ button in the Email Template field.

Document Defaults					
» Type	Document	Email Document	Email Template	Default Printer	Bin
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				
FA Asset Batch Labels	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				1
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			The second se	
JC Job Batch Labels	JCLabelSample.pfd				1
JC Job Labels	JCLabelSample.pfd			Select File (F2)	
JC Job Sheets	JCJobSheet.pfd				
JC Quotations	JCQuote.pfd				
OE Order Labels 👝	OELabelSample.pfd	B			
Porter B	wlenf	Simon Colorest	and a second second		

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

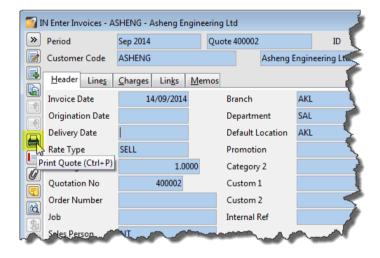
🛐 Select Email Template	23
Search INInvoice	Q
Organize 🔻 New folder 🛛 🕮 🖛 🗍	0
Image: Second Disk (C:) Image: Name Image: NLSrc (\\creosote) (L:) Image: NLSrc (\\creosote) (M:) Image: Mail (\\creosote) (M:) Image: NLSrc (\\creosote) (M:)	
Image: Second system Image: Second system	
scratch (\\creosote) (Z:)	
Network	Þ
File name: HTML Files (*.html;*.htm)	► el

Your Email Template will display in the Grid.

Type I	Document	Email Document	Email Template	Default Printer	Bin
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 I	ICLabelSample.pfd				
AR Customer Batch L	ARLabelSample.pfd				
AR Customer Labels	ARLabelSample.pfd				
AR Receipts	ARReceipt.pfd				
AR Statements	ARStatement.pfd				
FA Asset Batch Labels	FALabelSample.pfd				
FA Asset Labels	FALabelSample.pfd				
IC Count	ICCount.pfd				
IC Product Batch Lab 1	ICLabelSample.pfd				
IC Product Labels	ICLabelSample.pfd				
IC Product Sheet	ICProductSheet.pfd				
IC Transfer	ICTransfer.pfd				
IC Transfer Dispatch 1	ICLabelSample.pfd				
IC Transfer Receipt La I	ICLabelSample.pfd				
IN Invoice Labels	INLabelSample.pfd				
IN Invoice Product La I	ICLabelSample.pfd				
IN Invoices	INInvoice.pfd				
IN Packing Slips	INInvoice.pfd				
IN Quotes	INInvoice.pfd		INQuote_ABCHoldings.html		
JC Job Batch Labels	JCLabelSample.pfd				
JC Job Labels	JCLabelSample.pfd				

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.

🌍 IN Print Quotes	
Destination	Mail message
Format	Adobe PDF
Column headers	
File Name	
Email Template	INQuote_ABCHoldings.html
Report File Name	INInvoice.pfd
Options 🛡	Printer Settings

Then when you select Run, your Email will be created from your template.

😰 🛃 🦈 😈 🔺 🗇 🚏 🙇 - 🛴 👻 Estimate 400012 from ABC Holdings Limited for Asheng Engineering Ltd - Message (HTML)	
File Message Insert Options Format Text Review	∞ 🕜
To info@asheng.co.nz	
Subject: Estimate 400012 from ABC Holdings Limited for Asheng Engineering Ltd	
Attached: The Estimate 400012.pdf (6 KB)	
Dear Sir/Madam	
Thank you for giving us the opportunity to provide an estimate.	
Please find our Estimate 400012 attached.	
If you have any questions, please don't hesitate to call.	
We look forward to doing business with you!	
Mary Smith Office Manager	
ABC Holdings Ltd 10 Boston Road Mt Eden	
Auckland	
Click on a photo to see social network updates and email messages from this person.	