17 Email Templates

- Email templates are used to send information from the system in many places. All active users are provided with an email account - the system will use this account.
- All Email templates are either SYSTEM templates (such as Quote or Sales Invoice Templates) which can only be updated by Master Administrators; or Standard templates – which anyone can update.
- Users may save copies of non-system templates in their own template groups and sub-groups. This allows (for instance) customer facing staff to have their own name as the main group, and their own preference for sub-group names. As default all non-system template are shared. When a user selects a template, the entire template is copied into their own folder.
- Templates are built to be sent as standard emails, using Email HTML. They are created using up to 6 columns, and any number of rows. Users can merge cells by SPANNING columns and rows – and this creates any number of cells.
- Into each cell, the user may place text, images, merge fields or “snippets” of data.
- Merge fields allow the user to add personalisation and dates to the email, using “Fname“ field data for instance.
- Snippets are created by programmed code, that extract information such as client name, and invoice details and statement detail information.
- Quote and Sales invoice details are also added in using snippets. These can be changed by Master Administrators:

  Find them: Slider bar: **Admin icon: Accounting menu ->**

  Std Invoice Content Items -> INFO menu.

  - Set up any further “days terms” you need
  - Modify any items needed in the “z_invoice” section