ASICOMP.COM

How Do You Set up Email Template to accompany emailed forms?

Tammy Mason - 2022-07-20 - in Tools & Controls

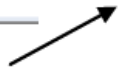### How Do You Set up Email Template to accompany emailed forms?
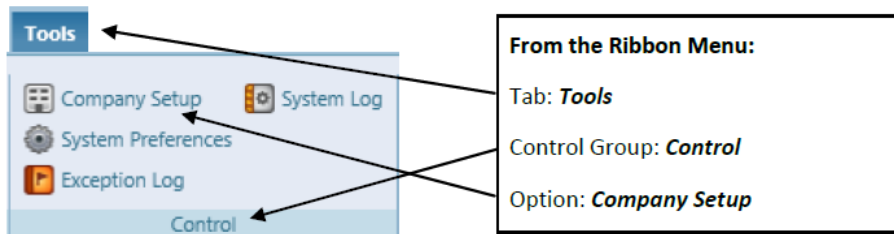
Explanation: Templates can be set up for the emails that accompany the order and invoice forms. Default email addresses for the "To:" and "CC:" fields can be set up that populate in addition to the customer or vendor contact email information.

Information such as order number, invoice number, and customer PO number can be inserted into the subject line or body of the email template. This information will populate with the correct information at the time the form is attached to be emailed.

Within the body of the email you can also insert a field for your company's contact information such as name, address, phone, fax, and Email. Under Document Defaults, select Email.

Document Defaults

Send Method	Email	Instructions

(Select)
- (Select)
- Acknowledgement
- Order-Commission
- Order-Internal
- Packing List
- Purchase Order
- Receiver
- Invoice
- Consolidated Invoice
- Quote-Proposal
- Quote-Request

You must click "Add Email" for each form you'd like.

To...	@ Type additional emails besides the customer or vendor contact email you wish to have a copy sent
Cc...	@ Type additional emails besides the customer or vendor contact email you wish to have a copy sent
Bcc...	@ Type additional emails besides the customer or vendor contact email you wish to have a copy sent
Subject:	Right Click here to see options to populate

Example:
"Thank you for your business. Attached you will find...."
or
Right Click in the Body to see your choices to populate:
- Order #
- PO #
- Your Company Name
- Your Company Address
- Your Company Phone #
- Your Company Fax #
- Your Company email