

Email Template

The **Email Template** screen is used to format the email the customers will receive when an Invoice is emailed to them. Open this screen from **Invoice | Email | Email Templates** button. This button will open a new Email Template screen if the customer on the Invoice does not have an existing email template yet. Otherwise, it will open all the email templates of the customer.

The screenshot shows two windows. The top window is titled 'Invoice -' and has a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', 'Print', 'Add Shipment', 'Email', 'Duplicate', 'Post', 'Recap', 'Recurring', and 'Close'. The 'Email' menu is open, showing 'Email Invoice' and 'Email Templates'. Below the menu bar, there are tabs for 'Details', 'Instructions', 'Payments (0)', 'Attachments (0)', and 'Add'. The 'Details' tab is active, showing 'Type: Standard', 'Recurring: ☐', 'Bill To: [blank]', and 'Freight Tern'. The bottom window is titled 'Email Template -' and has a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', and 'Close'. It has tabs for 'Details' and 'Add'. The 'Details' tab is active, showing 'Customer: [blank]', 'Email Sender: [blank]', and 'Default: ☒'. Below these are sections for 'Email Header' and 'Email Footer', each with a text area and a rich text editor toolbar. The 'Add Photo' button is visible in the 'Email Header' section. The status bar at the bottom shows 'Ready' and 'Page 1 of 1'.

Field Description

Customer - This field will default to the current owner of the Invoice where the Email Template is opened. You can select a different Customer whom the template will belong to.

Default - Check this if you want to set the default template of the customer. This is useful specially when there are multiple templates for a specific customer. The default template will be used when sending an [Email Invoice](#). If the customer has no default template, the system will use the standard email format.

Email Sender - Use this field to enter the email address the customer will see from where the email is coming from. This field will accept email address format only.

Email Header - Use this to set the texts displayed on the header area of the email.

Add Photo - Use this box to upload the logo that will be displayed on the email. There is no required size or dimension for the the logo. The system will auto-fit the photo to the box.

Email Footer - Use this field to set the texts displayed on the footer area of the email.

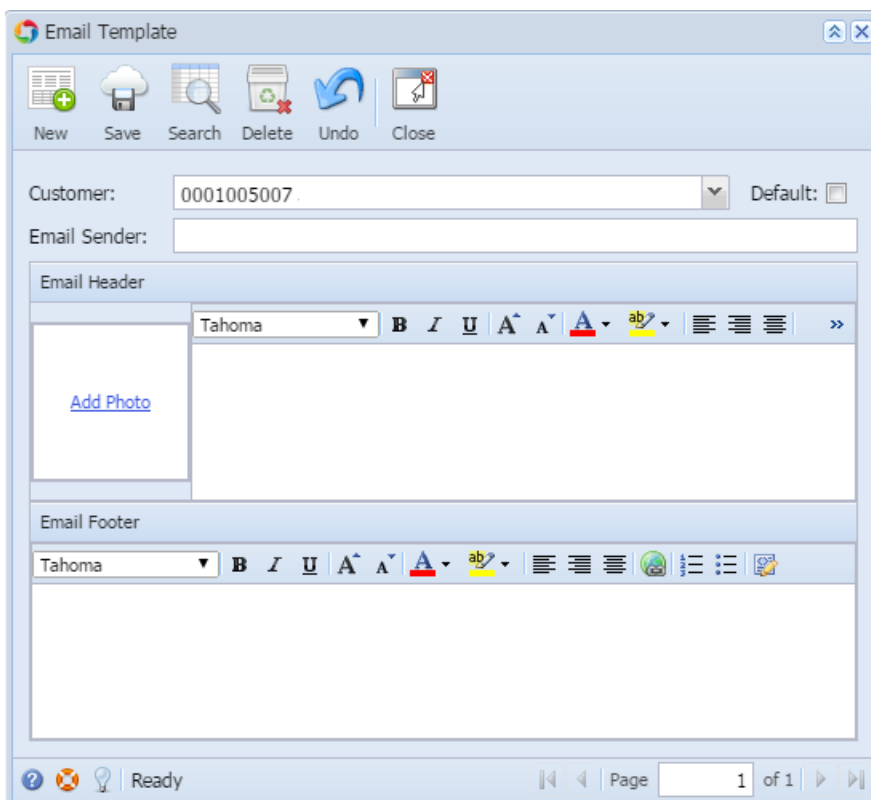
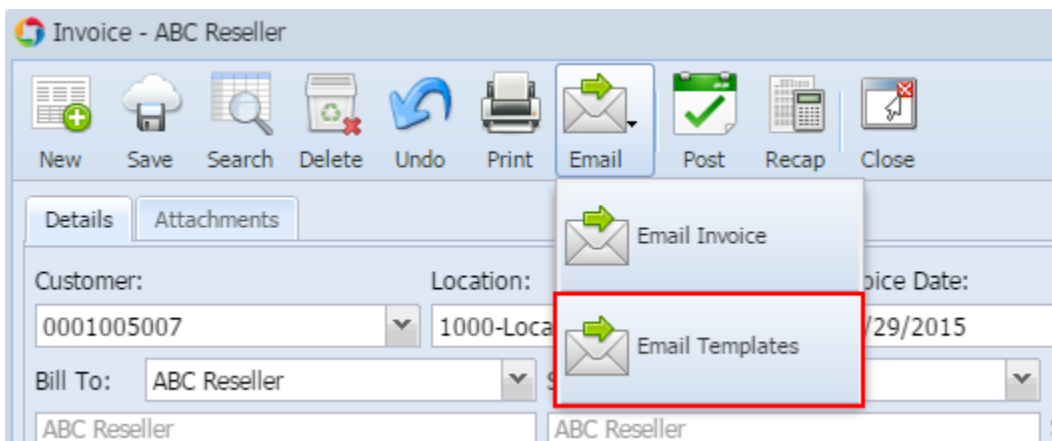
Pages

- [How to Add Email Template](#)

Related Topics

- [How to Email Invoice](#)
- [How to Batch Email Reports](#)

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Field Description

Same with above.