

# Email Templates

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## Overview

Order Time allows you to customize email templates to fit your different correspondence needs. You have the option to select specific information types that you want to be part of the email template.

We have now made it so that email sending is disabled by default during the free trial period. Contact us at [support@ordertime.com](mailto:support@ordertime.com) and we can verify your identity to enable this feature in your trial sandbox.

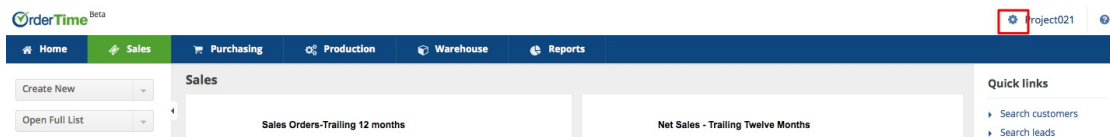
## Cloning Form Template

A system email template, where the ISCUSTOM button is not checked, cannot be deleted. The Body cannot be modified but you can change/edit the Name, Description and put a Subject. You can, however, clone any existing email template to use as a starting point.

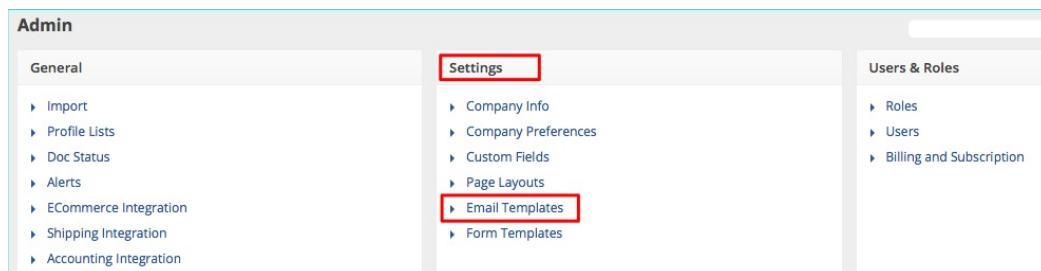
NAME	DESCRIPTION	ISCUSTOM
Generic Email	Generic Email Message	<input type="radio"/>
Quote Email	Quote Email	<input type="radio"/>
Sales Order Email	Sales Order Email	<input type="radio"/>

Cloning a form template is starting a new template. Below are the steps for setting up a new email template:

1. Click the **Gear** icon.



2. Under **Settings** category, click **Email Templates**.



3. Click the **Clone Form Template** icon.

Admin > Email Templates

Email Templates

Created By: [Dropdown] Search: [Input]

NAME	DESCRIPTION	ISCUSTOM	MODIFIED DATE/TIME	MODIFIED BY	ACTIONS
Generic Email	Generic Email Message	<input type="radio"/>	10/18/2016 12:09 PM	Admin	[Edit] [Delete]
Quote Email	Quote Email	<input type="radio"/>	10/18/2016 12:10 PM	Admin	[Edit] [Delete]
Sales Order Email	Sales Order Email	<input type="radio"/>	10/18/2016 12:10 PM	Admin	[Edit] [Delete]

- On the *Edit Template* page, provide a **Name** for your template. Make the name of your template as intuitive as possible for easy reference.
- Enter a description in the **Description** field. *Tip:* You can use this field to briefly describe what is the template specifically for.
- Put a **Subject** in the field.

Admin > Email Templates > Edit Template

Save

Name: [Input]

Description: [Input]

Subject: [Input]

Body: Dear {!Contact.FirstName}  
{!Company.CompanyName}  
{!User.FirstName} {!User.LastName}

Active:

Record Type: Adjustment [Dropdown]

Property: [Dropdown]

Token: [Input]

- Fill-out the body of the template.
  - In the **Body** section, the following are available by default. You can change these information.
    - Company Information
    - User information of the one sending the email
    - Contact which is only available for Customer, Leads and Sales Transactions - sales orders, quotes, ship docs and customer returns

Admin > Email Templates > Edit Template

Save

Name: [Input]

Description: [Input]

Subject: [Input]

Body: Dear {!Contact.FirstName}  
{!Company.CompanyName}  
{!User.FirstName} {!User.LastName}

Active:

Record Type: Adjustment [Dropdown]

Property: [Dropdown]

Token: [Input]

- To add information in the body of the template, select the **Record Type** from the picklist. When you choose the Record Type, make sure that it is relevant to the purpose of the template that you are creating and the type of information that you want to include in the body.

For example, if you are creating a template for POs, select Purchase Order from the Record Type picklist or if you are sending an estimated cost, you may want to choose Quote from the picklist.

- Depending on what you select as your Record Type, the **Property** picklist will be updated

with the attributes of that record type. Select the **Property** for the information that you want to include in the template and the corresponding **Token** will appear in the **Token** field.

Admin > Email Templates > Edit Template

**Edit Template** Save

Name

Description

Subject

Body

Dear {Contact.FirstName}

{Company.CompanyName}

{User.FirstName} {User.LastName}

Record Type: Purchase Order

Property: Bill Address Contact

Token: {PurchaseOrder.BillAddress.Contact}

10. Drag and drop the **Token** in the **Body** field, specifically to complete the following parts of the body:

- Greeting
- Message Body
- Closing and sender information

Subject

Body

Dear {PurchaseOrder.BillAddress.Contact}

{Company.CompanyName}

{User.FirstName} {User.LastName}

{User.Phone}

Record Type: Purchase Order

Property: Bill Address Contact

Token: {PurchaseOrder.BillAddress.Contact}

**Note:** You can also drag and drop the Token in the Subject field.

11. Type in additional details; and complete the rest of your message in the **Body** field.

12. Click **Save**. The new template will be available on *Email Templates* page.

The email template will be available as one of the template choices when you are sending email directly from Order Time.

>> Learn more about [sending email from Order Time with this video](#)

>> More info about [Activities including Emails](#)

## Editing Email Template

Below are the steps for editing email templates:

1. Click the *Gear* icon.
2. Under *Settings* category, click **Email Templates**.
3. Click the **Edit Email Template** icon.

Admin > Email Templates

Email Templates

Created By [dropdown] Search [input]

NAME	DESCRIPTION	ISCUSTOM	MODIFIED DATE/TIME	MODIFIED BY	ACTIONS
Generic Email	Generic Email Message	<input type="radio"/>	10/18/2016 12:09 PM	Admin	[edit] [delete]
Quote Email	Quote Email	<input type="radio"/>	10/18/2016 12:10 PM	Admin	[edit] [delete]
Sales Order Email	Sales Order Email	<input type="radio"/>	10/18/2016 12:10 PM	Admin	[edit] [delete]

4. Make the necessary changes on the template. One change that you can make, if needed, is to tag the template from Active to Inactive or vice versa by selecting the checkbox.
5. Click **Save**.

Admin > Email Templates > Edit Template

**Edit Template** Save Reset

Name:

Description:

Subject:

Body:

Record Type:

Property:

Token:

Active

You can edit the Name, Description and Subject for all email templates, including system emails. However, you cannot edit the Body of the template.

**Note:** You can also delete an email template by clicking the **Delete** icon on the *Email Templates* page.

Admin > Email Templates

Email Templates

Created By [dropdown] Search [input]

NAME	DESCRIPTION	ISCUSTOM	MODIFIED DATE/TIME	MODIFIED BY	ACTIONS
Generic Email	Generic Email Message	<input type="radio"/>	10/18/2016 12:09 PM	Admin	[edit] [delete]
Quote Email	Quote Email	<input type="radio"/>			[edit] [delete]
Quote Email for Hardware	Quote email for NEW Hardware prospect clients	<input checked="" type="radio"/>			[edit] [delete] [delete]
Sales Order Email	Sales Order Email	<input type="radio"/>	10/18/2016 12:10 PM	Admin	[edit] [delete]

## More about Customer Management with Order Time