

Editing Email Templates & Email Alert Actions

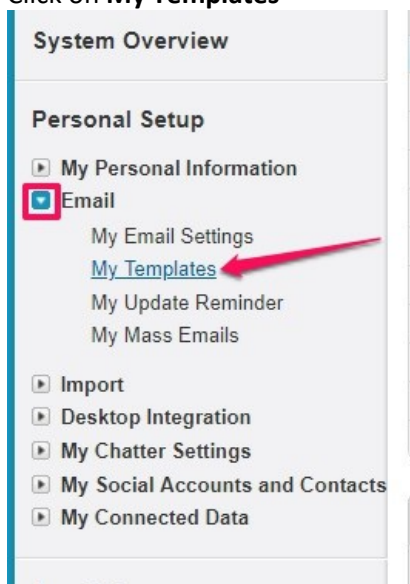
Editing Email Templates instructional video: <https://improveit360.wistia.com/medias/gmznpewyak>

Below are steps with screen shots to assist you with Editing your Email Templates.

In this example, we will be modifying the “Sale Completed Confirmation” which goes to the Prospect when their Sale status is changed to Final.

Here are some screen shots to guide you to editing Email Templates:

1. Click on your **Username** in the upper right-hand corner
2. Click **Setup**
3. Under Personal Setup, Click the **Arrow (>)** next to Email
4. Click on **My Templates**



5. Choose the **desired folder location**
6. Click on the **desired email template name**

Folder Lifecycle Communications Edit | Creat

Action	Email Template Name ↑
Edit Del	Appointment Cancellation Notice
Edit Del	Appointment Confirmation Email
Edit Del	Paid in Full Confirmation
Edit Del	Sale Completed Confirmation
Edit Del	Survey - Post Installation Standard

7. Click the button that says **Edit HTML Version**

Email Template Detail

Folder	Lifecycle Communications
Email Template Name	Sale Completed Confirmation
Template Unique Name	Sale_Complete_Confirmation
Namespace Prefix	i360
Installed Package	i360 Pro
Letterhead	Lifecycle Email Letterhead - Default
Email Layout	Formal Letter
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Author	System Admin [Change]
Description	Default email sent when a sale is completed
Created By	System Admin , 10/20/2017 7:10 AM

Email Template

Subject: Thank You for Your Business!

HTML Preview



- Use the **Formatting Controls** to change the Font, Size of the Font, Color and add Images or Embed Hyperlinks into the body of your email
- You can **Insert Merge fields** you'd like to be pulled from data within the system. Keep in mind the Object (Field Type) triggering this Email Template to be sent. In this example, we can only use Fields from the Sale Object ie: Sold On date, Sales Rep, Balance Due, Sale Status, etc. For this example, we will be inserting the Merge Field for Annual Maintenance Fee:

Available Merge Fields

Select Field Type: **Sale Fields** | Select Field: **Annual Maintenance Fee** | Copy Merge Field Value: **Annual Maintenance Fee_c**

Copy and paste the merge field value into a section below.

Select the Field Type then Select field (with arrows pointing to dropdowns)

Copy Merge Field Value (with arrow pointing to text box)

HTML Email Content

Subject: `{!Organization.Name}` Thanks You for Your Business!



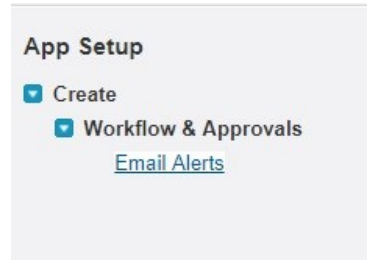
Dear `{!i360_Sale_c.i360_Correspondence_Name_c}`,

As one of our valued customers, we'd like to offer you an Annual Maintenance contract. We will come out annually to service your system and provide a free inspection to diagnose any issues that may arise. Our Annual Maintenance service is `{!i360_Sale_c.supportworks_Annual Maintenance Fee_c}` for the year. This brings our clients tremendous peace of mind, knowing their home is safe and secure from potential risk. Give us a call today to learn more about our Annual Maintenance program.

Edit Email Alert Actions

An Email Alert is the action used to send a specific Email Template based on a set of Criteria. In this example, we have written our own custom Email Template and would like to replace the “Sale Completed Confirmation” Email Template with the new one.

1. Click on your **Username** in the upper right-hand corner
2. Click **Setup**
3. In the Quick Find, Search for Email Alerts, then Click on **Email Alerts**
4. Choose the **All Email Alerts** folder
5. Click on **the name** of the Email Alert you would like to change, in this example we clicked on Sale Confirmation, then Click **Edit**



View: All Email Alerts | Create New View

Action	Description	Email Template Name	Object ↑	Last Modified Date
Edit	Sale Confirmation	Sale Completed Confirmation	Sale	10/20/2017
Edit	Sale Paid Confirmation	Paid in Full Confirmation	Sale	10/20/2017
Edit Del	Pending Design Specialist Email	Pending Design Specialist Notification	Sale	1/17/2019
Edit Del	Send Install Text 4	Install Text 4	Project	10/20/2017
Edit Del	Send Install Text 3	Install Text 3	Project	10/20/2017
Edit Del	Send Install Text 1	Install Text 1	Project	10/20/2017
Edit Del	Send Install Text 2	Install Text 2	Project	10/20/2017
Edit	Send Welcome Email	New Lead Welcome Email	Prospect	10/20/2017
Edit	Appointment Cancellation	Appointment Cancellation Notice	Appointment	10/20/2017

6. In the **Email Template** field, use the Lookup (magnifying glass icon) to search for the Email Template you’d like to be sent, then click **Save**.

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description:

Unique Name: ⓘ

Namespace Prefix: i360

Installed Package: [i360 Pro](#)

Object: Sale

Email Template: ⓘ

Recipient Type: Search: for: Find

Recipients

<p>Available Recipients</p> <ul style="list-style-type: none"> User: Chris Rice User: Dustin Kirby User: John Matthews User: Jon Erbst User: Katherine Gulick User: Kevin Drake <p style="text-align: right;">Add</p>	<p>Selected Recipients</p> <p>Email Field: Email Address</p>
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improveit 360 provides 4 automated customer-facing emails and 4 staff-facing emails out of the box in the software package. If there are additional email automations you’d like to have setup in your system, improveit 360 can program additional automations starting as low as \$250. If you are interested in additional Email automations, please open a Case using the Support Widget. Please provide as much information as possible in the Case and our team will review your request and get back to you with a customization estimate.