



Title of document	How to create email templates
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Purpose

This procedure explains how admin users can create new and edit existing email templates from the SQLWorks Preferences menu and assign them to the various email types.

Scope

This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment. The procedure is aimed at the admin users, who will be operating the SQLWorks client.

Change History:

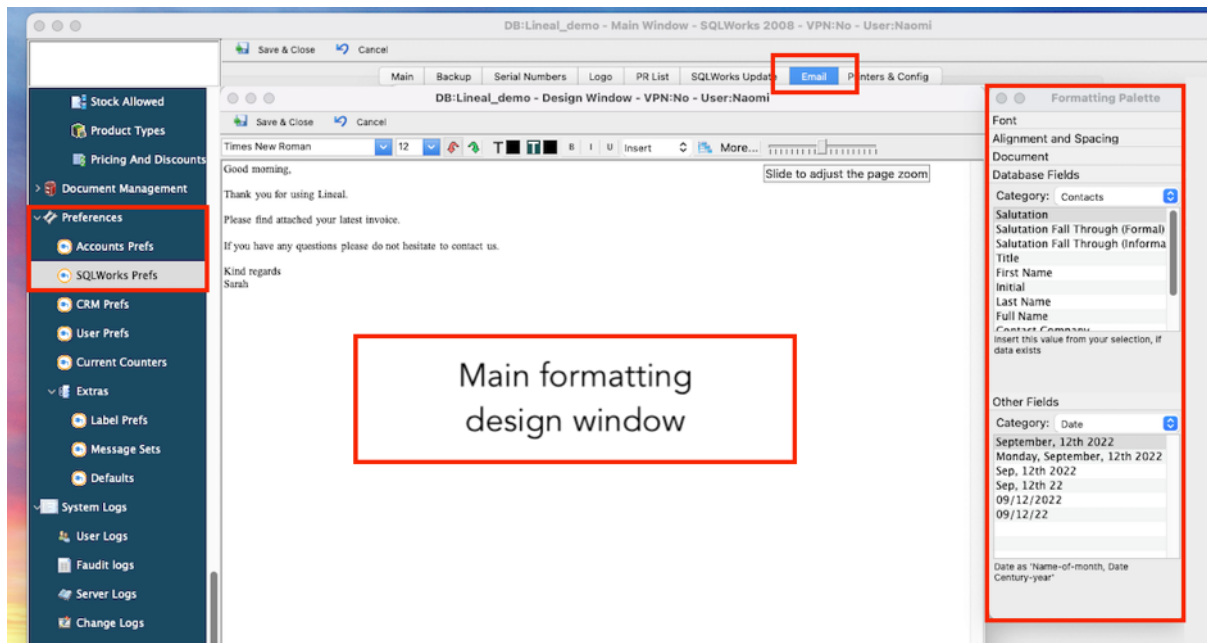
Date	Version	Created by	Description of change	Approved by
11.10.22	1	Naomi Joachim		Will Adkin
02.11.22	2	Naomi Joachim	Added intro to include save as new template function directly from email	Will Adkin

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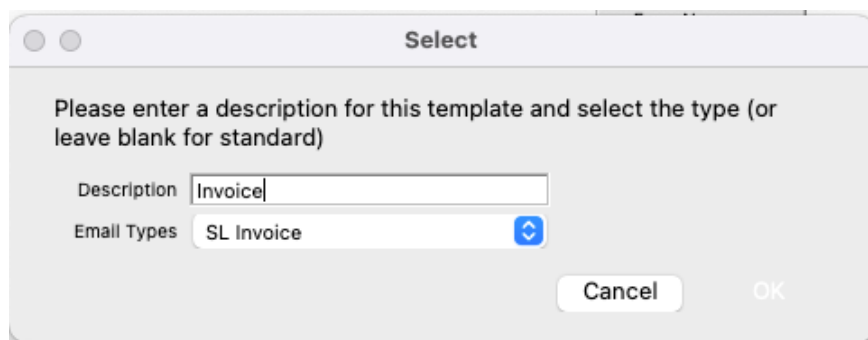
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Email templates can be designed and saved ahead of time to select from when sending emails, these can be designed in the SQLWorks Prefs as detailed below. Alternatively, if an existing template is not used or the user does not have access to SQLWorks Prefs, there is also the option to save any email as a new email template. This can be done by right clicking on the template section menu found at the top of a new email, this will save the template for future use.

Where to find templates



1. To view templates already created for emails go to SQLWorks Prefs which can be found in the Preferences master menu in the main nav bar on the left. Click on Edit or double click on the company.
2. Navigate to the 'Email' tab in the top section on the right, then to the 'Email Settings' tab then click the 'Manage Templates' button.
3. If no Templates have been created a Message will pop up informing you no templates have been found and asks if you would like to create a new one.

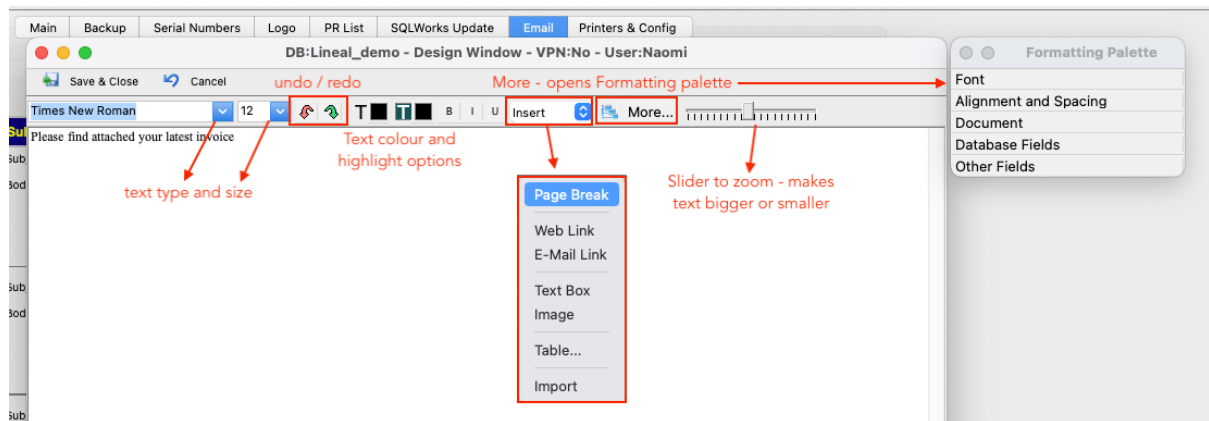


4. The above pop-up box will appear, here you can give the template a description and if you choose, save this template to a specific email type - there is a dropdown list to choose from.

If this is left blank this template can be selected for generic emails only. For example, creating a new email directly from the emails tab on a company's account.

5. The design window will then open with some editing tools across the top, with additional tools in the formatting palette to the right – if not open by default this can be opened using the More button. There is also a zoom slider to make the text bigger or smaller, to ease editing/template creation.

Design window options



6. There are several text editing tools across the top of the screen, to edit the font, the size, add highlighted text sections (sometimes useful for sections of email to be edited personally each time) as well as some additional features such as the zoom slider and 'More' button for the formatting palette.
7. Under the 'Insert' dropdown there are some further options for adding external items such as links to websites, adding images or text boxes or tables to adjust the layout of the email template. Each of the inserted items has additional editing tools available specific to the type of item via a right click. This may be sizing and picture formatting tools for images for example, or hyperlink options for web links.
8. If you select an email "Type" then relevant database fields are available to add, for example, invoice fields are available to add when creating an invoice template. For all emails you will have company and contact fields. You can use the salutation fall through option to allow SQLWorks to create a best guess at a name in case of missing data. If you create a template that uses data, but that data is not available when you come to use the template then you will be warned (unless you are doing a bulk email process).
9. For more information on editing options see our How to use the design window and formatting palette guide on our Help page.

