

Communications – Editing Email/Text Templates AV REF #701

About:

BPOS has a powerful email and texting features.

The email / texting features contain a number of templates you can choose from. You can choose to use the templates as-is, or you can make edits to your system's email and texting templates.

How:

- Click on Views → Administration & Utilities → Store → View/Edit Email Templates.
- Find the Email/Text Template you want to edit. *Right-click* and you will see options to Add a Template, Edit Template or Delete A Template. Select Edit Template.

| VIEW: ADMINISTRATION & UTUTIES | | | STORE NAM | |
|--------------------------------|--------------|--------------------------------|---------------------|--|
| View/Edit Email Templates | | | | |
| Туре | Title | | | |
| USER-DEFINED | ADDITIONAL I | REPAIRS | Your %V | |
| USER-DEFINED | GENERA | Edit Template | ssage | |
| USER-DEFINED | NOT REA | Luit remplate | ur %V | |
| USER-DEFINED | OFFER | Add Template | ocial (| |
| USER-DEFINED | PLEASE | Add remplate | Edit Template ion | |
| USER-DEFINED | READY-V | | ur %V | |
| USER-DEFINED | RECOMM | Delete Templates | ur %V | |
| USER-DEFINED | THANKS | | anks F | |
| SYSTEM | APPT-CC | | pointn | |
| SYSTEM | APPT-RE | Save as PDF | Ctrl+Shift+P pointn | |
| SYSTEM | SEND-IN | | ur Atta | |
| SYSTEM | SEND-PC | Save as PDF (Printer-Friendly) | Alt+Shift+P ached | |
| SYSTEM | SEND-QL | | ur Atta | |
| SYSTEM | SEND-RE | Save as CSV | Ctrl+Alt+P ached | |
| SYSTEM | SEND-ST | | ur Atta | |
| SYSTEM | SEND-TRANS | FER | Attached | |

File Views Inventory Workstation Store Corporate Utilities Links Set Store Help

3. Make your edits as needed. You can edit the **Title**, the **Subject**, **Text Body** and **Email Body**.

The "Text Body" is what is sent out when you send text messages.

The "Email Body" is what is sent out when you send emails.

4. To make the texts and emails customer-specific, you will use the Symbols that begin and end with a % sign. These symbols tell the program to pull the customer's vehicle, name, your business name, etc and insert them directly into the text or email. For example, to let the customer know information about the vehicle they have dropped off, you would type %VEH% in the spot the customer's vehicle would need to go in your message.

For more help with the various available **%Symbols%** and what they actually mean, you can click on the **Symbol Help** button:

| 🔡 Edit Email | Templates | X | | | | | | |
|--------------------------------------|--|---|--|--|--|--|--|--|
| Title | READY-VEHICLE | | | | | | | |
| Subject | Your <mark>%VEH%</mark> is ready | | | | | | | |
| | YOUR %VEH% IS READY TO BE PICKED UP. | | | | | | | |
| Text Body | | | | | | | | |
| | Dear %CUST%, | * | | | | | | |
| | Your <mark>%VEH% i</mark> s ready to be picked up. Please contact us if you will be delayed. | | | | | | | |
| | Regards, | | | | | | | |
| Email Body | Thank You %BIZ% | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | - | | | | | | |
| Flags | | | | | | | | |
| Save Cancel Symbol Help Suggest Help | | | | | | | | |

5. When you are finished with your edits, click **Save** at the bottom.

To test your email templates...from the Sales Counter, you can add your email to the store's CASH ACCOUNT. You can then select **SEND EMAIL / TEXT** to test your email and text templates.



You can select each template you want to perform a test send on.

| Send Email | | | | | | | × |
|------------------------|--|---|--------------------|---------|-------------------|----------|-------------|
| From: | Maverick Tires Oil & Auto Service | <maver< th=""><th>icktoas@gmail.com></th><th>~</th><th>SIGNATURE ON FILE</th><th>Attach</th><th>ements</th></maver<> | icktoas@gmail.com> | ~ | SIGNATURE ON FILE | Attach | ements |
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| Cc: Bcc: | | | | <u></u> | | | |
| Tomplatoo | Salact Ontional Tomplata | ~ | | | | Add File | ✓ |
| Templates: Subject: | Select Optional Template Select Optional Template ADDITIONAL REPAIRS GENERAL MESSAGE NOT READY-VEHICLE OFFER PLEASE CALL READY-VEHICLE RECOMMENDED + QUOTE | | • Email () Text | | | Add File | Remove File |