

Communications – Editing Email/Text Templates AV REF #701

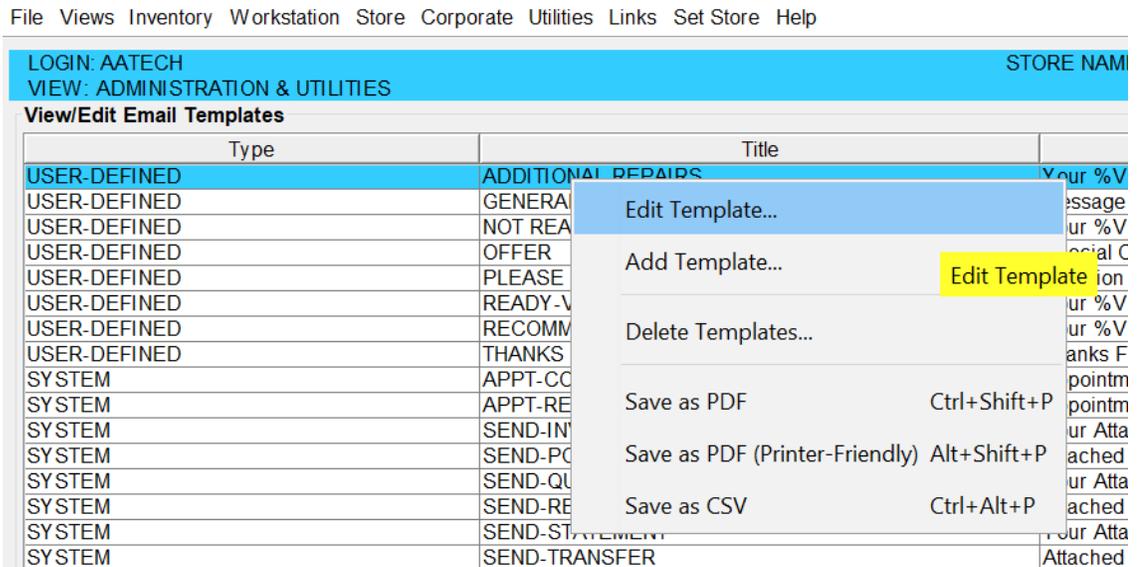
About:

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:

1. Click on **Views → Administration & Utilities → Store → View/Edit Email Templates.**
2. 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.**



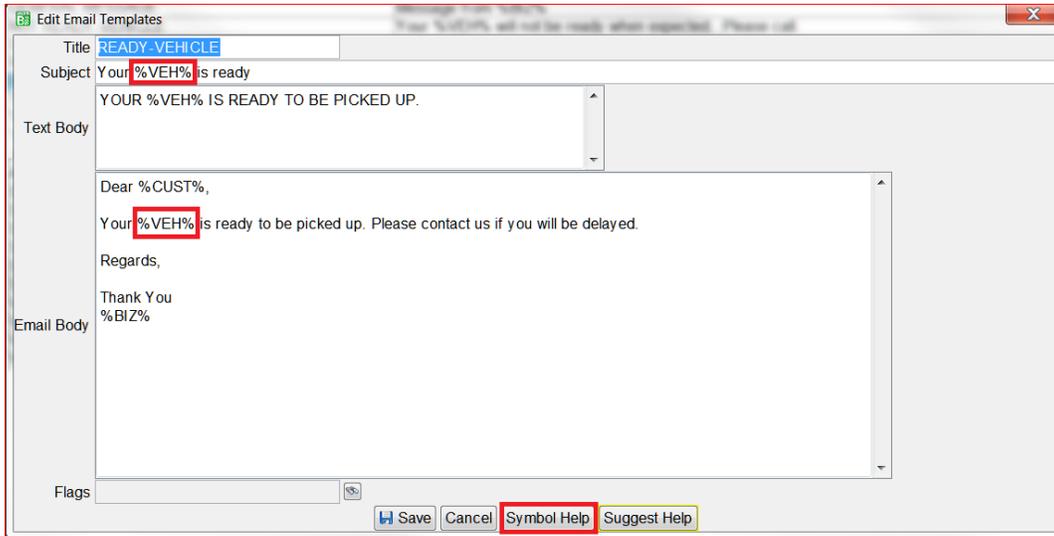
3. Make your edits as needed. You can edit the **Title**, the **Subject**, **Text Body** and **Email Body.**

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.

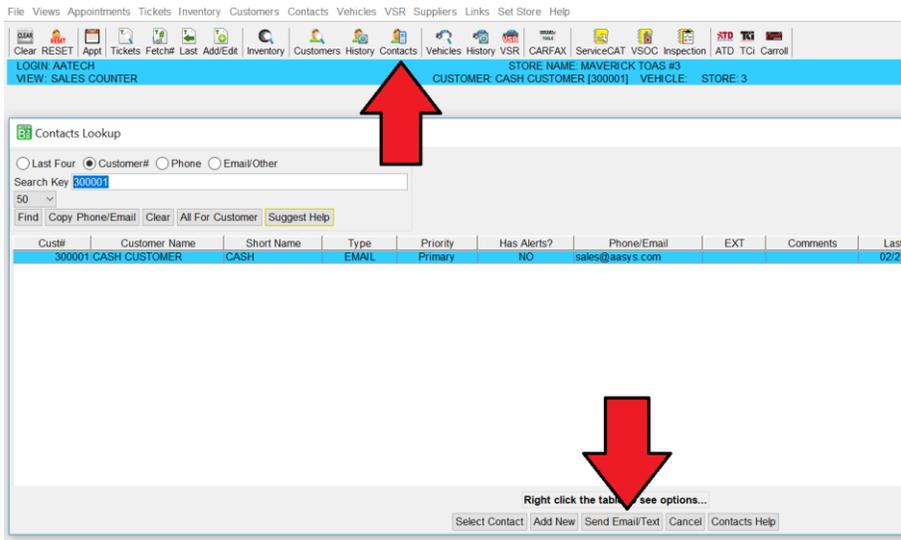
- To make the texts and emails customer-specific, you will use the Symbols that begin and end with a % sign. These symbols tell the program to pull the customer's vehicle, name, your business name, etc and insert them directly into the text or email. For example, to let the customer know information 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:



- 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<mavericktoas@gmail.com> SIGNATURE ON FILE

To: CASH CUSTOMER<sales@aasys.com> ✉

Cc: ✉

Bcc: ✉

Attachments: ↑

Templates: Select Optional Template... Email Text Add File Remove File

Subject:

- SELECT OPTIONAL TEMPLATE...
- ADDITIONAL REPAIRS**
- GENERAL MESSAGE
- NOT READY-VEHICLE
- OFFER
- PLEASE CALL
- READY-VEHICLE
- RECOMMENDED + QUOTE

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