Ad Hoc Email Templates

11/14/2024 11:20 am CST

Overview

Ad Hoc Emails are designed to be used when you want to send an email to a contact and be able to have it automatically populate with information about them, or an appointment or a proposal. You can create as many as you like and they can be used in several different ways.

1. You can send an email as a one-off. From a Contact or Appointment detail page, you can click the **Email** button, then select a template which will then pre-populate. You will then have the opportunity to edit the content before it's actually sent.



2. You can attach an ad hoc email to a Service. For instance, you have a sales or estimate service that doesn't need to get the standard appointment complete email. Create an ad-hoc specifically about the service and attach it via **Control Panel > Service > Edit** the service.

Confirmation Schedule	Days Before	Email Template	
	days before	✓ Select One	
	Printing	OLP Kansas Confirmation proposal accepted test	
Appointment Ticket	Default	Appointment Complete	
	Optional ad hoc template to	hugh appt complete Default Email Template	
Proposal	Default	New Appointment Canceled	
	Optional ad hoc template to	Appointment Confirmation - Time Frames Appointment Complete w/tip and review	

3. Use ad hoc emails in Drip Campaigns based on Drip Triggers or more general marketing campaigns.

#	Action	Details
⊗	Send Email	Ad Hoc TemplateSelect one
\bigotimes	Select one	Service NAME - Appointment Confirmation

Settings and Navigation

Go to Control Panel > Ad Hoc Emails.

Ad Hoc Emails Edit the email templates that you can use to send individual emails to contacts.

Creating and Editing Ad Hoc Emails

The easiest way to start a new Ad hoc email is to duplicate an existing one.

Ad Hoc Email Templates									
Page 1 of 1 (2 items)									
<u>Add</u>	Name	Ŷ	Active						
Edit Duplicate	Proposal Expired		Yes						
Edit Duplicate 9 Create Filter	Service NAME - Appointment Confirmation		Yes						

You can also Add a brand new one. Then choose between preloaded themes or create your own.

First step after creating the email is filling out any field with an * (asterisk). That would include the **Name** of the email, the **Type**, and the email **Subject**.

For Type, you have to make sure it matches the purpose of the email. Is this an Appointment confirmation? Then you need to make sure the type is appointment.

Edit Ad Hoc Template							
Name*	Service NAME - Appointment Confirmation						
Active?	Contact						
Туре*	✓ Appointment						
Subject*	Proposal Invoice						
Test Email Address	Test Email Address neatnerg@serviceminder.com						
	Enter an email address to send a test message to						

Then you can add or edit text within the email. You can include images, links, and Shortcodes.

Emo	ail Fo	orma	t																
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Inser	t Image	(# P)																	

You can also edit in the HTML view, but we do not recommend this unless you are comfortable.

Email Format									
A = Ti → A =									
% ⊠ III © - № Ø Ø O C									
1 html Code View									
2 <html></html>									
3 <head></head>									
<pre>4 <link href="https://cdnjs.cloudflare.com/ajax/libs/font-awesome/4.4.0/css/font-awesome.min.css" rel="stylesheet"/></pre>									
<pre>5 <style type="text/css"></style></pre>									

Texting Templates

You can also create a text template along with the email template. If you have a trigger to send an email, you can also send out this text at the same time. You will need to have two-way texting feature in service**minder** to use this functionality.



If you only want a text message, just leave the email box blank. And if you use a Drip Trigger, select Send Text.

Adding Attachments to Ad Hoc Emails

If you would like to add attachments to email templates, they need to be a URL link within the email. To do this, first

add your document to the collateral library. (Control Panel > Collateral Library)

Once it's been added hover over the image with your mouse, there is an icon that is "Copy URL", click that and then insert that copied URL link into the Ad Hoc email template where you want the attachment to be.



When the email is received the person can click on that link to access the attachment.

FAQs

How do I know which type to use?

Are you sending this to a Contact and want to use Contact shortcodes? Is this message based on an Invoice and getting final payment, then you will need to use Invoice shortcodes. Make sure the type of the email matches the topic of the email, the shortcodes, the Drip Triggers, and/or the Drip Campaigns.

You may not be using triggers or campaigns. But use the mindset of everything in the system connects and should align on Type.

Troubleshooting

My shortcodes aren't working.

Make sure you are copying and pasting them from our shortcodes page. Or, if you manually typed them, that they are not square brackets []. Those shortcodes will not work, they must be curly brackets {} and match what our system was built to search for.

For instance, [appointment.find] will not work.

Find correct Shortcodes here.