Automated Email Templates

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Overview

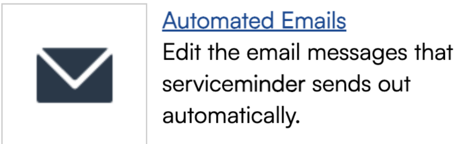
Automated emails are sent by service**minder** when certain events happen, such as an appointment is scheduled or completed. By default, each organization has the exact same versions of these emails. However, a brand may choose to edit these to be more unique.

It is our recommendation that these be as standard for your brand as possible and that franchisees not edit them without brand approval.

This article will review:

Settings and Navigation

You can locate these templates in **Control Panel > Automated Emails**.



Many of these emails can also be turned on or off by going to **Control Panel > Notification Settings > Turn Notifications On/Off**.

List of Automated Emails

Below is a table containing most of the available templates and how they are used.

Template	Usage
Appointment Complete	This template is used for emails sent when an appointment is marked complete. This is different than the invoice, as the invoice may not be sent till the invoice is approved. As soon as an appointment is marked finished (typically by the Service Agent), this email will be sent.

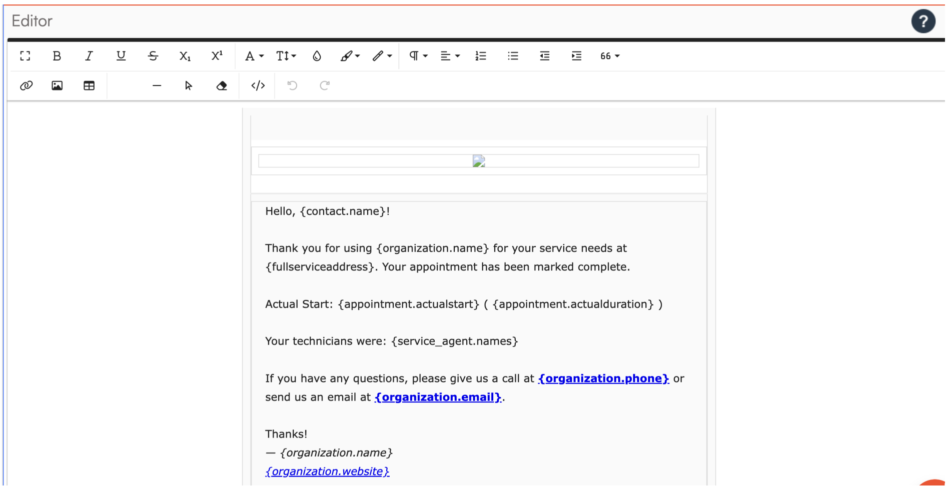
Template	Usage
Appointment Confirmation	Sent when an appointment is scheduled (not tentative, not queued). This will also be sent when an appointment is modified, including if it is committed (which clears the Tentative flag) or modified such that it is no longer within the Target Date/Timeframe set when the appointment was initially created. Configurable per appointment.
Appointment Renewal	If a Contact has an Appointment completed where the Service has a service interval, a reminder will be created set at 90% of the recommended service interval. When it comes time to send that reminder, this is the template that is used.
Contact Invoice	When an invoice is initially created and emailed, this is the template that will be used. It will typically include a link to view the invoice online. Will only be sent if you choose the **Send** option on an invoice, or if the invoice is generated automatically.
Contact Proposal	When a proposal is initially emailed, this template is used. Will only be sent when you choose the **Send** option on a proposal.
Contact Receipt	When an invoice is paid in full (either online by the customer or a payment is applied through service**minder**), this email template is used to send the receipt. The receipt can be viewed through a link that is included in the email. This is sent automatically when paid online, but can be sent again later by choosing to **Send** the invoice. If you apply the payment internally, you'll have a **Send** option there as well.
Installment Payment Failure	When an installment payment fails to run, this email is sent to the contact to inform them. They'll be provided with a link to update their payment information online.
Installment Payment Reminder	This email is not sent out by default, but can be enabled by going to Control Panel > Notification Settings > Payment Notifications. This will send out a reminder n days before a payment is due.
Installment Payment Success	Sent out to the contact when an installment payment successfully runs.
Contact Reset Password	If you send an online account invite to a contact or they go through the "lost password" sequence on the Account portal, this is the email that will be sent.

Template	Usage
Invoice Reminder	Open invoices will be automatically emailed to customers with email addresses, but only after the invoice has been initially sent to them. This template is different than the initial invoice template so you can include additional verbiage regarding your payment policies, etc. How often this is sent can be configured by going to Control Panel > Scheduling > Invoices.
Proposal Confirmation	When a proposal is accepted, with or without a deposit and/or invoice, either by a user or by the contact.
Proposal Reminder	Open proposals get reminder emails sent automatically, but only after the initial proposal has been sent. You can include different text in this as well that may address common questions. How often this is sent can be configured by going to Control Panel > Proposals.
Proposal Update	When a deposit is applied to a proposal.
Service Agent En Route	Service Agents have the option of sending a message to the contact to inform them that they're on their way. If the En Route notification method on an appointment is set to email, then this is the template that is used. Configurable per appointment.
Statement Ready Notification	If Consolidated Invoices is enabled, this email will be sent on the Consolidated Payments Day. It will include a link to the customer's statement as well as a PDF copy for download.

Editing Automated Email Templates

You have the ability to edit these automated emails. However, we strongly urge caution and wouldn't recommend doing this without brand consent.

Use caution when editing these templates. Once changed, it is hard to revert these emails back to their original state.



These will all include Shortcodes that pull in specific information about your organization, the contact, appointment, invoice, proposal, etc.

FAQs

Does the customer always get an invoice automatically sent to them?

It depends on the settings at the service level of when the invoice is generated. You can learn more aboutService Settings: Invoicing Mode, but here is an example. If you have it set to generate the invoice upon Proposal Accept, once the customer clicks "Accept" on their side or you internally accept on their behalf, the following happens:

1. Proposal Confirmation email will go out. This includes the proposal link, which redirects to the invoice when it is generated.
2. Proposal acceptance page redirects to invoice upon acceptance.

You can stop these automated emails from going out by updating settings in **Control Panel > Notifications**. You will want to turn them on/off in the Contacts column. Be aware that changes at this level affect all contacts and all services. If you turn it off for Proposal Accept confirmations then no customer will receive them automatically moving forward.

If your question comes out of a curiosity about payments and how to consolidate them or set up auto payments, you can learn more about Invoice Settings or Automatic Payments.

When the appointment confirmation emails that go out, can we give the client an option to confirm or reschedule?

Yes, there's an appt confirm shortcode that can be added to email templates so the customer can confirm.

`{appointment.confirm_url}`

To reschedule, the default appointment confirmation template already has this text below added to it and the customer can click the appointment URL link to reschedule.

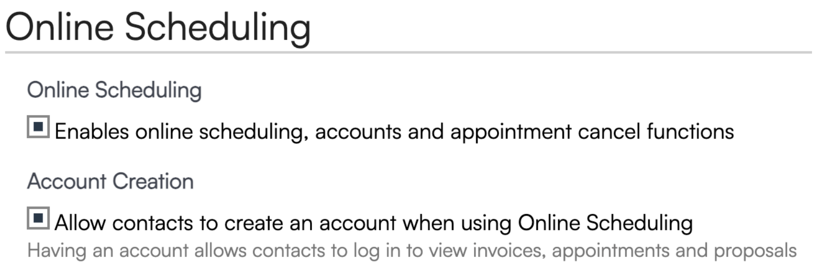
```
{% if model.organization.is_online_scheduling_enabled -%}If you need to
reschedule or cancel your appointment, please do so at least 24 hours prior by
clicking the link below:

{appointment.url} {% endif -%}
```

You can see the coding starts with "if model.organization.is_online_scheduling_enabled", which means that the text above the URL will only show up in the email if you have online scheduling turned on. The URL itself will show up no matter what.

To enable online scheduling, you have to turn it in the following locations:

Control Panel > Scheduling:



Control Panel > Services for each service that you want customers to be able to self-schedule.