

# Create Ad-Hoc Email Templates

04/30/2025 4:37 pm CDT

## Overview

Ad hoc email templates are designed to be used when you want to send an email to a contact and have it automatically populated with information about them, an appointment, a proposal or an invoice. From a Contact or Appointment Detail page, you can click the Email button, and select a pre-populated template that can be edited before sending.

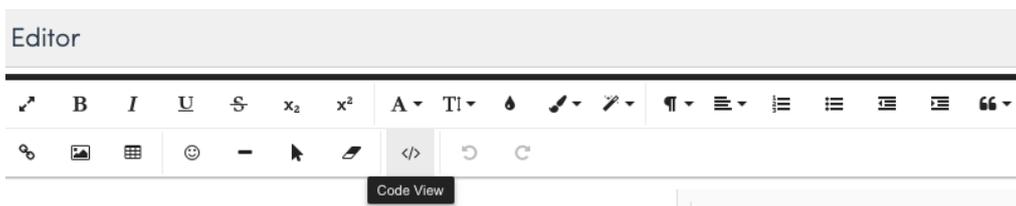
They can be created for a wide-range of uses from email promo campaigns to drip triggers when a proposal expires. Please note that Drips is an add-on feature, so you may not have this capability.

## Settings and Navigation

To start creating your own Ad Hoc emails go to **Control Panel > Automated Emails**.

## Copying Automated Email Template

Select Edit beside the Automated Template that you want to copy. When the Editor opens you want to select the option shown for **Code View** </>.

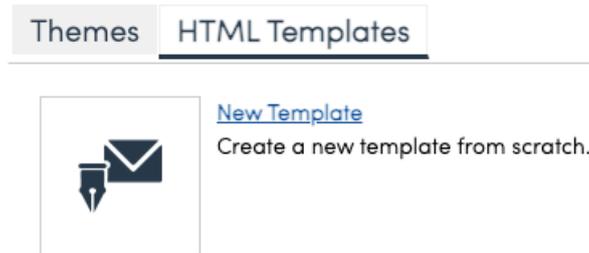


Once Code View is select you will see the HTML code on screen which you will **Copy and Paste** the entire page.

```
1 |<!DOCTYPE html>
2 |<html>
3 |<head>
4 |<link rel="stylesheet" href="https://cdnjs.cloudflare.com/ajax/libs/font-awesome/4.4.0/css/font-awesome.min.css">
5 |<style type="text/css">
6 |   body {
7 |     margin: 0;
8 |     padding: 0;
9 |     background-color: #eeeeee;
10 |    color: #999999;
11 |    font-family: Arial, Helvetica, sans-serif;
12 |    font-size: 12px;
13 |    -webkit-text-size-adjust: none;
14 |   }
15 |   /*Hotmail and Yahoo specific code*/
16 |
17 |   .ReadMsgBody {
18 |     width: 100%;
19 |   }
20 |
21 |   .ExternalClass {
22 |     width: 100%;
23 |   }
24 |
25 |   .yshortcuts {
26 |     color: #999999
27 |   }
28 |
29 |   .yshortcuts a span {
30 |     color: #777777
31 |   }
```

## Creating an Ad Hoc Email Template

After all code text has been copied, go back to **Control Panel > Ad Hoc Email Templates > Add > Select HTML Template > New Template**.



Add Ad Hoc Template - Name the Template and Select if this template will be available for a contact, appointment, proposal or invoice.

Add Ad Hoc Template

Name\*

Active?  Active

Type\* ▼ Contact  
Appointment  
Proposal  
Invoice

Subject\*

Import (Optional)

Editor

Type something

Remember that whatever template type you select, only some **shortcodes** will be available to use. I.e. invoice shortcodes won't work on proposal ad hoc email templates. Organization and contact shortcodes will work on all templates.



In the Editor section, reselect the **Code View** for HTML code, paste the code taken from the automated email template. You can switch back to the visual editor by hitting the Code View button one more time. You can make edits here and save.

You can set the Ad Hoc emails as automated to go out in individual services. This gives you flexibility if you want to

have a particular confirmation go out for a particular service instead of the automated emails.

In the Ad Hoc email editor, there's a Texting Format section at the bottom where you can create [Text Templates](#).

---

## Tips

For tips and tricks in creating your emails, check out our [cheatsheet here](#).

- If you'll be using your email in a campaign or on a drip trigger, or in place of automated emails for services, make sure your email type matches the type on your event.
  - For email campaigns, the contact-type email templates will be for campaigns launched on the contacts grid. For a proposal campaign, use a proposal-type template.
  - For a proposal-type drip campaign, you can send proposal-type emails, and will need to use a proposal type trigger action.
- 

## Public Print URLs

Sometimes you need to include a direct link to a printable version of a proposal, ad hoc template, or invoice –*without* requiring the user to log in. This is great for sharing documents via email or including them in automated notifications.

Here's how to do it:

### For Proposals

Use the following format to create a public link to a printable version of a proposal:

```
https://serviceminder.io/service/proposal/pdf/{proposal.hash_key}
```

Just replace `{proposal.hash_key}` with the actual hash key of the proposal.

### For Ad Hoc Print Templates

If you're linking to an ad hoc print template tied to a proposal, use this format:

```
https://serviceminder.io/service/proposal/adhocprinttemplate/{template_id}?proposal_id={proposal.hash_key}
```

- Replace `{template_id}` with the ID of the specific print template.
- Replace `{proposal.hash_key}` with the proposal's hash key.

### For Invoices

To create a similar link for invoices, simply swap the word `proposal` with `invoice` in either URL format above. For example:

```
https://serviceminder.io/service/invoice/pdf/{invoice.hash_key}
```

