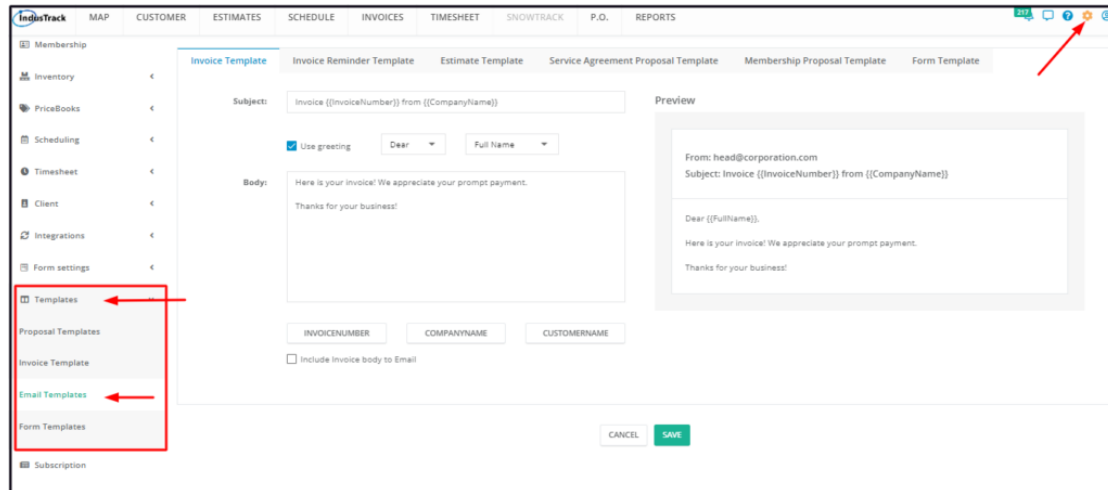


Template Settings: Email Templates

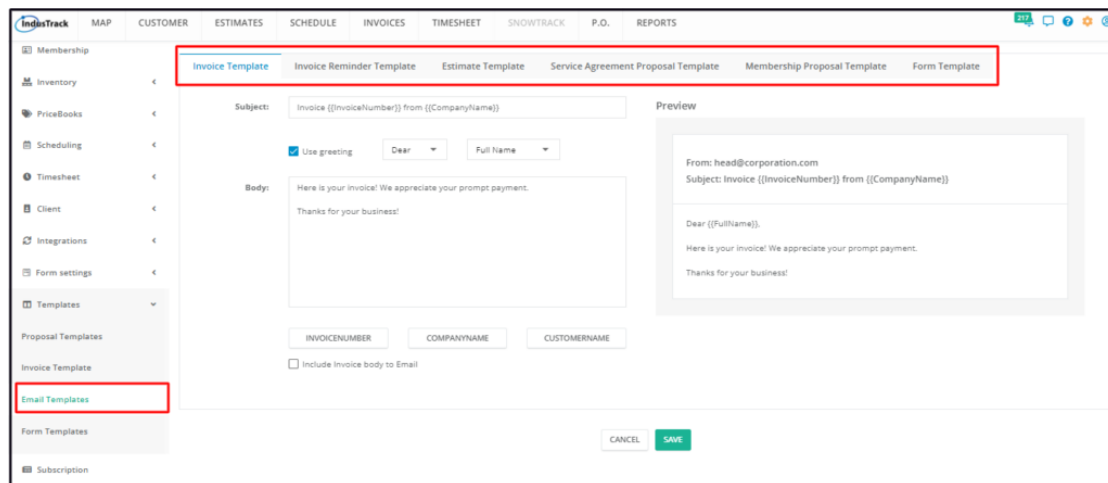
Setting up and/or customizing your own email templates will make your notifications feel more “branded”. You have control over what information is to be included in your emails and dictate the tone you want to project to your customers. You can make the emails very business-like or with a hint of a personal touch.

To access the Email Template Builder page, go to **Settings > Templates > Email Templates**.



From the settings page, you'll be able to customize the default email templates and craft how you would like your emails to look and sound. Six (6) different email templates are customizable from this page:

- Email Template for Invoices
- Email Template for Invoice Reminders
- Email Template for Estimates
- Email Template for Service Agreement Proposals
- Email Template for Membership Proposals
- Email Template for Forms



Using the Email Template Builder

For each of the email templates, a default message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the email.

Each email template was created using the **Email Template Builder**. To update or revise the default messages, use the Builder found in each tab of the Email Templates page.

Variable Statements

Variable statements will automatically pull information from different sections of your IndusTrack account such as your client's name. Be careful not to edit any part of the statement. Editing these variable statements will result in errors and will not correctly pull the needed information.

The screenshot shows the 'Invoice Template' editor in IndusTrack. The 'Subject' field is populated with 'Invoice {{InvoiceNumber}} from {{CompanyName}}'. The 'Body' field contains the text 'Here is your invoice! We appreciate your prompt payment. Thanks for your business!'. A red box highlights the variable statements in the subject line, and a red arrow points to the 'Variable Statements' button located below the body text area. The preview on the right shows the rendered email content.

The templates have different sets of variable statements. The selectors are located below the email body textbox.

The screenshot shows the 'Invoice Template' editor in IndusTrack. The 'Subject' field is populated with 'Invoice {{InvoiceNumber}} from {{CompanyName}}'. The 'Body' field contains the text 'Here is your invoice! We appreciate your prompt payment. Thanks for your business!'. A red box highlights the variable statement selectors (INVOICENUMBER, COMPANYNAME, CUSTOMERNAME) located below the body text area. The preview on the right shows the rendered email content.

To use a variable statement, place the cursor where the statement should appear.

The screenshot shows the 'Invoice Template' editor in IndusTrack. The 'Subject' field is populated with 'Invoice {{InvoiceNumber}} from {{CompanyName}}'. The 'Body' field contains the text 'Here is your invoice! We appreciate your prompt payment. Thanks for your business!'. A red box highlights the text 'For the account of' in the body field, and a red arrow points to the 'Variable Statements' button located below the body text area. The preview on the right shows the rendered email content.

Click to select the variable statement button.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Use greeting Dear Full Name

Body: Here is your invoice! We appreciate your prompt payment. Thanks for your business! For the account of |

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FullName}},

Here is your invoice! We appreciate your prompt payment.

Thanks for your business!

For the account of

The variable statement will be added to the email template.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Use greeting Dear Full Name

Body: Here is your invoice! We appreciate your prompt payment. Thanks for your business! For the account of {{CompanyName}}

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FullName}},

Here is your invoice! We appreciate your prompt payment.

Thanks for your business!

For the account of {{CompanyName}}

Update the Email Message (Applies to All of the Email Templates)

Subject

Revise the default **subject line** as needed. If you need to add or replace the default variable statements, follow the steps above.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Use greeting Dear Full Name

Body: Here is your invoice! We appreciate your prompt payment. Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FullName}},

Here is your invoice! We appreciate your prompt payment.

Thanks for your business!

Greetings

Tick the **Use Greeting** checkbox to set the default salutation of the email.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear First Name

Body: Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FirstName}},

Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

Select the greeting to be used – Dear, To or Hello.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear To Hello First Name

Body: Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FirstName}},

Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

Select how you'd like the client's name to appear:

- First Name – Refers to the contact person's first name.
- Last Name – Refers to the contact person's last name.
- Full Name – Refers to the contact person's complete name.
- Customer Name – Refers to the client's Company Name.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear Full Name First Name Last Name Customer Name

Body: Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

☐ Include Invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FirstName}},

Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

If you'd rather use a different salutation, untick the Use Greeting checkbox and add this to the **Body** of the email.

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Invoice Template Invoice Reminder Template Estimate Template Service Agreement Proposal Template Membership Proposal Template Form Template

Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☐ Use greeting Dear First Name

Body: Good day, Sir!
Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAM CUSTOMERNAME

☐ Include invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Good day, Sir!
Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

Body

Edit the message of the email inside the Body textbox as needed. If you need to add variable statements on the Body, follow the steps above on how to do this.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear First Name

Body: Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAM CUSTOMERNAME

☐ Include invoice body to Email

CANCEL SAVE

Preview

From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FirstName}},
Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

Email Template Preview

As you go along updating the email template, the changes will be reflected in the Preview section of the builder in real time. Preview what your customized email template looks like from this section.

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Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear First Name

Body: Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

INVOICENUMBER COMPANYNAM CUSTOMERNAME

☐ Include invoice body to Email

CANCEL SAVE

Preview

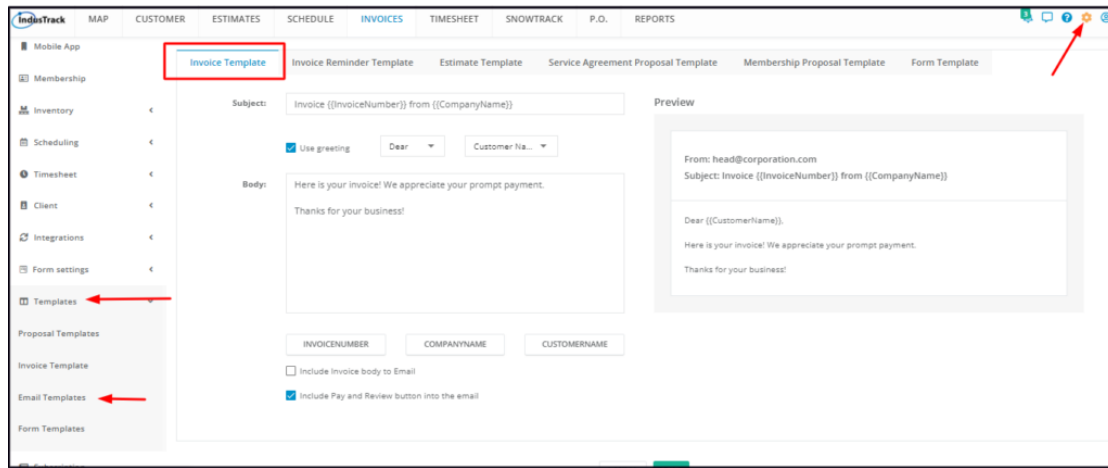
From: head@corporation.com
Subject: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{FirstName}},
Here is your invoice! We appreciate your prompt payment.
Thanks for your business!

Email Template for Invoices

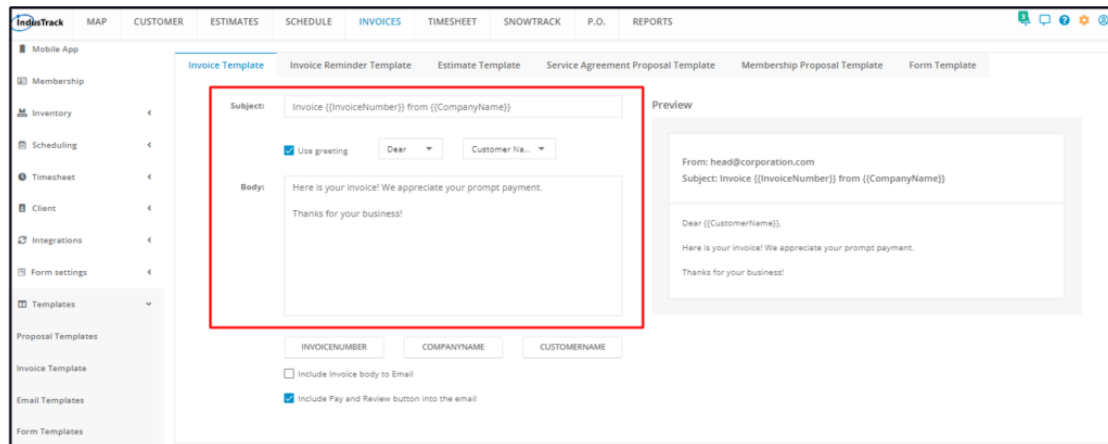
A pdf copy of the invoice is attached when it is sent to the client via email. A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the invoice via email.

To update or revise the invoice email template go to **Settings > Templates > Email Templates > Invoice Template**.



Revise the default Email Template for Invoices

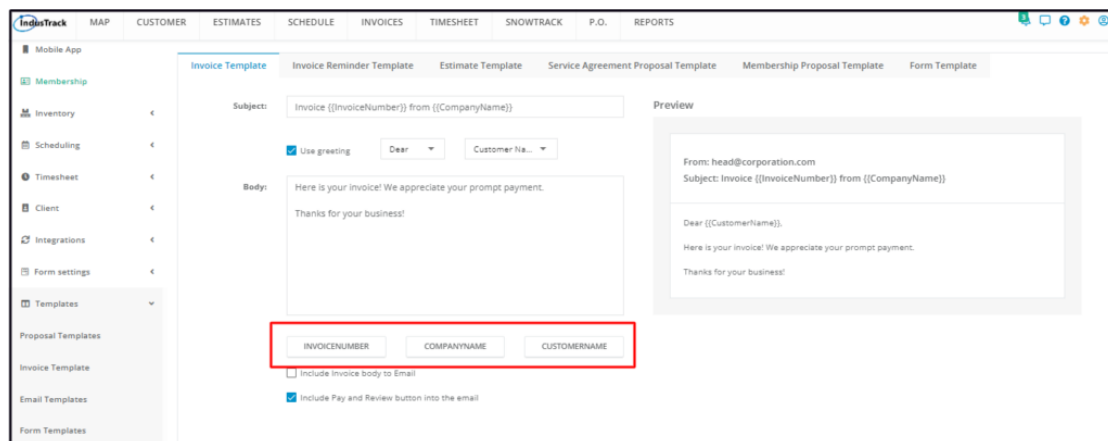
Use the email template builder in revising the default email. Refer to the section Using the Email Template Builder above for instructions on how to do this.



Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Invoices are:

- Invoice Number
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.



Include Invoice body to Email

Tick the checkbox for the option **Include Invoice Body to Email** if you want this done. Aside from the attached pdf copy of the invoice, its content will also be indicated in the email body.

Leave the checkbox unticked if the attachment is enough.

Include Pay and Review Button in the Email

If the checkbox for the **Include Pay and Review Button into the Email** option is ticked, the client will receive the email with their invoice and be provided with a link to pay their invoice online and subsequently review the payment details.

Leave the checkbox unticked if online payment of the invoice is not an option.

Preview the email template and **Save** once done. This will now be the default content of the email when the Invoice is sent to the client via email.

Email Template for Invoice Reminders

The Invoice Reminder feature is a great way for pulling in past-due payments. The trigger for this email to fire is an unpaid invoice. When this will happen is dependent on the reminder settings.

The Invoice Reminder email template will be sent to the customer if the reminder is enabled and the conditions for the trigger are met. A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the invoice reminder.

To update or revise the invoice reminder email template go to **Settings > Templates > Email Templates > Invoice Reminder Template**.

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Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

☐ Use greeting Dear Full Name

Body: Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

Preview

From: head@corporation.com
Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

CANCEL SAVE

Revise the default Email Template for Invoice Reminders

Use the email template builder in revising the default email. Refer to the section **Using the Email Template Builder** above for instructions on how to do this

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Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear Full Name

Body: Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

Preview

From: head@corporation.com
Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{Fullname}},

Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

CANCEL SAVE

Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Invoice Reminders are:

- Invoice Number
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.

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Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

☒ Use greeting Dear Full Name

Body: Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

Preview

From: head@corporation.com
Subject: Reminder: Invoice {{InvoiceNumber}} from {{CompanyName}}

Dear {{Fullname}},

Just a reminder that we have not received a payment for this invoice yet. Let us know if you have questions. Thanks for your business!

INVOICENUMBER COMPANYNAME CUSTOMERNAME

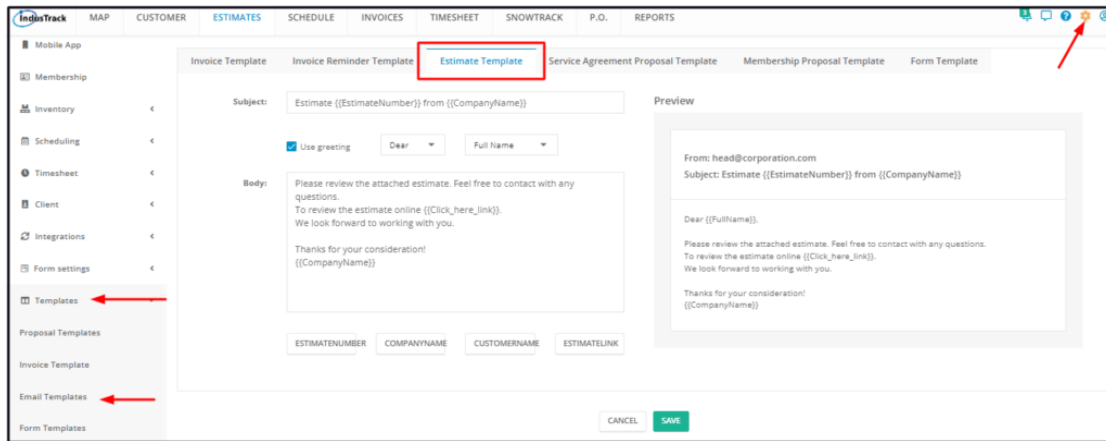
CANCEL SAVE

Preview the email template and **Save** once done. This will now be the default content of the email when the Invoice Reminder is enabled.

Email Template for Estimates

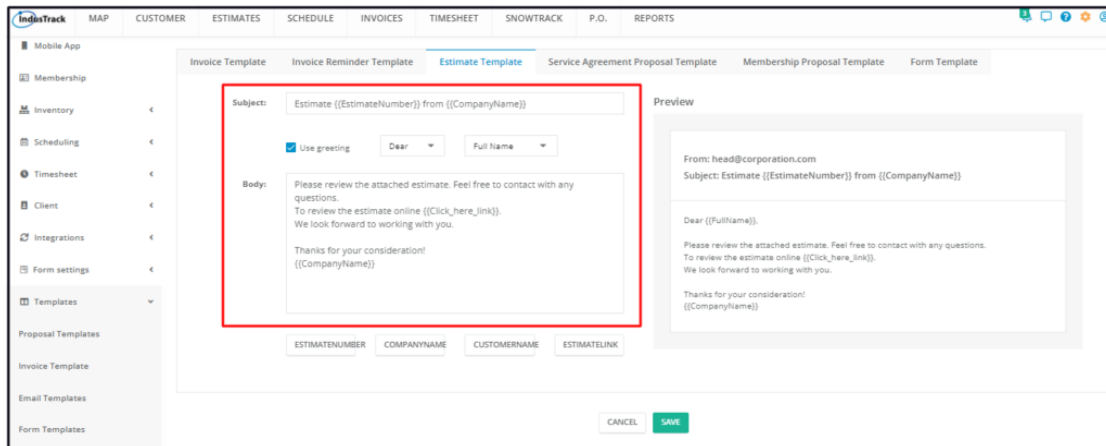
A pdf copy of the estimate is attached when it is [sent to the client via email](#). A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the estimate via email.

To update or revise the estimate email template go to **Settings > Templates > Email Templates > Estimate Template**.



Revise the default Email Template for Estimates

Use the email template builder in revising the default email. Refer to the section **Using the Email Template Builder** above for instructions on how to do this.



Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Estimates are:

- Estimate Number
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.
- Estimate Link – The link is provided to the customer to be able to access the Estimate online.

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Invoice Template Invoice Reminder Template **Estimate Template** Service Agreement Proposal Template Membership Proposal Template Form Template

Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

☒ Use greeting Dear Customer Name

Body: Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

ESTIMATENUMBER COMPANYNAME CUSTOMERNAME ESTIMATELINK

Preview: From: head@corporation.com Subject: Estimate {{EstimateNumber}} from {{CompanyName}} Dear {{CustomerName}}. Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

CANCEL SAVE

Preview the template and **Save** once done. This will now be the default message when the estimate is sent via email.

Email Template for Service Agreement Proposals

A pdf copy of the **Service Agreement Proposal** is attached when it is sent to the client via email. A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the proposal via email.

To update or revise the service agreement proposal email template go to **Settings > Templates > Email Templates > Service Agreement Proposal Template**.

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Invoice Template Invoice Reminder Template Estimate Template **Service Agreement Proposal Template** Membership Proposal Template Form Template

Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

☒ Use greeting Dear Full Name

Body: Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

ESTIMATENUMBER COMPANYNAME CUSTOMERNAME ESTIMATELINK

Preview: From: head@corporation.com Subject: Estimate {{EstimateNumber}} from {{CompanyName}} Dear {{Fullname}}. Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

CANCEL SAVE

Revise the default Email Template for Service Agreement Proposals

Use the email template builder in revising the default email. Refer to the section **Using the Email Template Builder** above for instructions on how to do this.

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Invoice Template Invoice Reminder Template Estimate Template **Service Agreement Proposal Template** Membership Proposal Template Form Template

Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

☒ Use greeting Dear Full Name

Body: Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

ESTIMATENUMBER COMPANYNAME CUSTOMERNAME ESTIMATELINK

Preview: From: head@corporation.com Subject: Estimate {{EstimateNumber}} from {{CompanyName}} Dear {{Fullname}}. Please review the attached estimate. Feel free to contact with any questions. To review the estimate online ({{Click_here_link}}). We look forward to working with you. Thanks for your consideration! {{CompanyName}}

CANCEL SAVE

Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Service Agreement Proposals are:

- Estimate Number
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.
- Estimate Link – The link is provided to the customer to be able to access the Proposal online.

Preview the template and **Save** once done. This will now be the default message when the proposal is sent via email.

Email Template for Membership Proposals

A pdf copy of the **Membership Proposal** is attached when it is sent to the client via email. A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the proposal via email.

To update or revise the membership proposal working email template go to **Settings > Templates > Email Templates > Membership Proposal Template**.

Revise the default Email Template for Membership Proposals

Use the email template builder in revising the default email. Refer to the section **Using the Email Template Builder** above for instructions on how to do this.

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Subject: Estimate {{{EstimateNumber}}} from {{{CompanyName}}}

☒ Use greeting Dear Full Name

Body:

Please review the attached estimate. Feel free to contact with any questions.
To review the estimate online {{{Click_here_link}}}.
We look forward to working with you.

Thanks for your consideration!
{{{CompanyName}}}

ESTIMATENUMBER COMPANYNAME CUSTOMERNAME ESTIMATELINK

Preview

From: head@corporation.com
Subject: Estimate {{{EstimateNumber}}} from {{{CompanyName}}}

Dear {{{FullName}}},

Please review the attached estimate. Feel free to contact with any questions.
To review the estimate online {{{Click_here_link}}}.
We look forward to working with you.

Thanks for your consideration!
{{{CompanyName}}}

CANCEL SAVE

Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Membership Proposals are:

- Estimate Number
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.
- Estimate Link – The link is provided to the customer to be able to access the Membership Proposal online.

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Subject: Estimate {{{EstimateNumber}}} from {{{CompanyName}}}

☒ Use greeting Dear Full Name

Body:

Please review the attached estimate. Feel free to contact with any questions.
To review the estimate online {{{Click_here_link}}}.
We look forward to working with you.

Thanks for your consideration!
{{{CompanyName}}}

ESTIMATENUMBER COMPANYNAME CUSTOMERNAME ESTIMATELINK

Preview

From: head@corporation.com
Subject: Estimate {{{EstimateNumber}}} from {{{CompanyName}}}

Dear {{{FullName}}},

Please review the attached estimate. Feel free to contact with any questions.
To review the estimate online {{{Click_here_link}}}.
We look forward to working with you.

Thanks for your consideration!
{{{CompanyName}}}

CANCEL SAVE

Preview the template and **Save** once done. This will now be the default message when the membership proposal is sent via email.

Email Template for Forms

A copy of the **Form** for the client's completion is attached when it is sent to them via email. A default email message has been prepared by IndusTrack. Unless the settings are revised by you, the default message will be used when sending the form via email.

To update or revise the form email template go to **Settings > Templates > Email Templates > Form Template**.

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Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

☒ Use greeting Dear Customer Name

Body: Please review the attached estimate. Feel free to contact with any questions. To review the estimate online {{Click_here_link}}. We look forward to working with you. Thanks for your consideration! {{CompanyName}}

FORMNAME COMPANYNAME CUSTOMERNAME

Preview

From: head@corporation.com
Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

Dear {{CustomerName}},

Please review the attached estimate. Feel free to contact with any questions. To review the estimate online {{Click_here_link}}. We look forward to working with you.

Thanks for your consideration! {{CompanyName}}

CANCEL SAVE

Revise the default Email Template for Forms

Use the email template builder in revising the default email. Refer to the section **Using the Email Template Builder** above for instructions on how to do this.

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Subject: {{Form_Name}} from {{CompanyName}}

☒ Use greeting Dear Full Name

Body: Please review and complete the attached form. Feel free to contact me with any questions. We look forward to hearin from you soon. Thank you! {{CompanyName}}

FORMNAME COMPANYNAME CUSTOMERNAME

Preview

From: head@corporation.com
Subject: {{Form_Name}} from {{CompanyName}}

Dear {{Fullname}},

Please review and complete the attached form. Feel free to contact me with any questions. We look forward to hearin from you soon.

Thank you! {{CompanyName}}

CANCEL SAVE

Use Variable Statements

If you need to add variable statements on any section of the email, follow the steps above on how to do this. The Variable Statements for the Email Template for Forms are:

- Form Name
- Company Name – This refers to your company name.
- Customer Name – This refers to your client's company name.

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Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

☒ Use greeting Dear Customer Name

Body: Please review and complete the attached form. Feel free to contact with any questions. We look forward to hearing from you soon. Thank you! {{CompanyName}}

FORMNAME COMPANYNAME CUSTOMERNAME

Preview

From: head@corporation.com
Subject: Estimate {{EstimateNumber}} from {{CompanyName}}

Dear {{CustomerName}},

Please review and complete the attached form. Feel free to contact with any questions. We look forward to hearing from you soon.

Thank you! {{CompanyName}}

CANCEL SAVE

Preview the template and **Save** once done. This will now be the default message when the Form is sent via email.