



MS Invoice Exchange

Managing Email Templates

To get started, create a template. You can always remove the template so feel free to do whatever you wish for this example.

Login and click the *Email Templates* button.

Email Templates

With this screen, you can create and edit email templates to use when you submit new invoices OR when resending them from the View Transactions screen.

You have a couple of options:

- Leave "Add a new template" in the drop down list and create a new one
- Select an existing Template, modify it and "Save Changes"
- Select an existing Template, modify it and choose "Save As New" to save a new Template from the existing one. Be sure the Template Name is unique.

VERY IMPORTANT: In your template you will want to put in "placeholders" that will be substituted for real values when your email is being sent.

Here is an example. In the default template, you will see:

We have attached invoice INVOICENUMBER for CUSTOMERNAME in PDF format. This will be transformed to "We have attached invoice *EVE0012345* for The *Green Company* in PDF Format.

INVOICENUMBER and **CUSTOMERNAME** are placeholders

When creating your template you will put those placeholders in where ever you want their values to show up when you create an email.

Hide Instructions

The above instructions will be displayed. Once you know what to do, click *Hide Instructions* to free up some screen space.

When you create a template, there are values that will need to be substituted into your template when you actually send out your email. For example, the invoice number. In your template you will put INVOICENUMBER to indicate where you want the invoice number to be placed.

Here is a listing of the placeholders you can use. Click the placeholder to put it into the clipboard where you can easily paste it into the template.

- **INVOICENUMBER** - displays the Invoice Number
- **CUSTOMERNUMBER** - displays the Customer Number
- **CUSTOMERNAME** - displays the Customer Name
- **CREDITCARDLINK** - displays the link that the customer can use to pay the invoice via credit card.

- 1) You will leave the “Add a new template” in the drop down list since this is a new template.
- 2) Put something into the Name field to help you identify what the template is used for.
- 3) Enter the Subject for your email. It is defaulted but override to suit your needs.

Templates

Name:

If choosing Save As New, please provide a unique name for this template.

Subject:

This is the “Default” email template used all throughout the Template feature. It is the standard email that has been used and for some, it is all that is needed.

Body:

The screenshot shows an email editor interface. At the top, there is a toolbar with icons for bold (B), italic (I), bulleted list, link, unlink, indent, and outdent. To the right of the toolbar are dropdown menus for 'Styles' and 'Format', and a 'Source' button. The main content area contains the following text:

Hello,

We have attached invoice INVOICENUMBER for CUSTOMERNAME in PDF format. This invoice is only being sent to you in an electronic format.

Please make your payment using one of the following options:

Credit Card
Remit payment by credit card by using this link CREDITCARDLINK

If your browser does not support that link and it doesn't work, please enter this URL in your browser:
<https://www.msinvoiceexchange.com> then click on the Credit Card Payment button and enter your Invoice Number (INVOICENUMBER) customer number (CUSTOMERNUMBER).

Check Payments:
Microsoft Corporation
P.O. Box 847255

body

You will notice the “placeholders” in the templated. Edit the template any way you wish. To insert a placeholder, you can either type it or click the placeholder name above (green button) and paste into the body. That is the best way so you don't have a typo.

The CREDITCARDLINK should be explained a bit. It is fairly obvious what the link is used for. However, you should note that if you create an invoice and you click the option on the invoice entry screen to not allow credit card payments, the link will STILL show up in your email template. The template is created before the entry screen so it is up to you to make sure the template matches what you enter on your invoice.

For example, if you uncheck the the option circled in red, your invoice will NOT be able to be paid by credit card. However, if your template has CREDITCARDLINK, your email will still have a credit link in it. When your customer clicks that link, they will get a message that they cannot pay via credit card.

| General Invoice Information | |
|-----------------------------|---|
| Payment Terms | Due Upon Receipt ▼ |
| Customer PO Number | <input type="text"/> |
| Allow Credit Card payment | <input checked="" type="checkbox"/> |
| ONLY accept Credit Cards? | <input type="checkbox"/> |
| Send invoice Via | <input checked="" type="radio"/> Email <input type="radio"/> US Mail <input type="radio"/> Both <input type="radio"/> None |

After you are done editing, click Save As New. If you have made a mess of things, click the Reset to Default button to refill the body of the template to the default. Then give it another try.

body

Cancel Save As New

If you have made a mess of things, click here to reset the email body to the defaults Reset to Default

Using an Email Template

For this illustration, I have saved my template with the name "IA conference".

I am now at the place where I have entered my invoice and clicked Submit. Here is what you will see:

Invoice Entry

Format The Email To Your Customer

Use this screen to make any adjustments to the email you are about to deliver to your customer with your invoice.

You have email templates you can use! Select one from the drop down list to pre-format your email (optional).

IA conference Reset Email Body

Be aware that your template may conflict with your allowed payment methods above. For example, if your template provides a credit card payment link but you elected above to not allow credit card payments your email will provide invalid information. You will be responsible to correct your template accordingly.

Separate multiple email addresses with a semi-colon

To:

joe@invoicesanywhere.com

CC:

joe@invoicesanywhere.com

Subject:

Payment instructions for your Microsoft invoice

NOTE! This is very important: your invoice has been created at this point. If you cancel this action (sending the email), you can STILL send it out exactly as you would on this screen. You simply go to the View Transactions screen and click the Email Icon. That will be described later in this document.

You are now at the stage where you can select any template you have created and even edit it if you want to. Any edits you make to the template here will not be saved to the template. You must use the Email Templates screen to modify your templates.

Click the drop down list to select the template you wish to use. By default, the first template in your list (listed alphabetically in your drop down list) will be populated into the screen. Choosing a different template re-populates the screen with that template.

If at any point you want to start over with your email, either select a different template or click the *Reset Email Body* button which is right next to the template name.

If you do not want to use a template and start from the Default (you don't HAVE to use use your templates!), you can click the *Reset Email to Default* button just below the body section.

Note how the various placeholders have been replaced with actual values. If you accidentally edit the links, they may get corrupted so do not edit them. If you do edit one accidentally, you should reset the template to correct the links. Otherwise, your customer will get errors when they click the credit card payment link.

Body:

Hello,

We have attached invoice EVE0034408 for InvoicesAnywhere, LLC in PDF format. This invoice is only being sent to you in an electronic format.

Please make your payment using one of the following options:

Credit Card
Remit payment by credit card by using this link [Credit Card Payment](#)

If your browser does not support that link and it doesn't work, please enter this URL in your browser: <https://www.msinvoiceexchange.com> then click on the Credit Card Payment button and enter your Invoice Number (EVE0034408) customer number (N15095).

Check Payments:
Microsoft Corporation
P.O. Box 847255

body

Check here if you want to go to the Email Template screen to create an email template after you send this email

[Reset Email to Default](#)

The default template will reflect the selected payment methods above.

Click *Send Email* to send it to your customer. If you click Cancel, DO NOT PANICK! You can still send the EXACT same email to the customer. It will be described later in this document.

Your invoice has been created. If you cancel at this point you will need to send your invoice to your customer manually.

[Cancel](#)

[Send Email](#)

If you have made a mess of things, click here to reset the email body to the defaults

Click the check box just above the Reset Email to Default button if you want to go immediately to the Email Template form after sending this email. You might want to do this if you have just created a nice

new email and you want it to become a template. Just copy the body into the clipboard and when you get to the Email Templates screen, paste it into the body section. Then modify it to have the placeholders as required.

That is it...you have just created a template and used it to send an invoice to your customer.

A FEW QUICK NOTES

- You will always be CC'd on the email. You do not need to put your email address in the CC box.
- Put any email addresses you want in the TO and CC but be sure to separate them with a semi-colon.

Sending an Email from the View Transactions Screen

Go to the View Transactions screen (from the Main Menu), locate your invoice and click the Email button:

Displaying rows 1 through 25

Items per page 25 < 1 >

If you do not see your invoice or if nothing is displayed, click **Show All**. Your invoice may have already been paid.

| Customer # | Customer Name | Contact | Document # | Description | Type | Functional Amount | Balance | Refunded | Date | Due Date | Originating Amount | Email | Apply Info | Receipt | Edit | Void | Close | Clone |
|------------|-----------------------|---------|------------|-------------------------------|---------|-------------------|-----------|----------|----------|----------|--------------------|-------|------------|---------|------|------|-------|-------|
| N15095 | InvoicesAnywhere, LLC | | EVE0034408 | Sponsorship for IA conference | Invoice | 20,000.00 USD | 20,000.00 | 0.00 | 1/4/2017 | 1/4/2017 | 20,000.00 USD | | | | | | | |

You will now see the EXACT same screen as described in the previous section. Follow the above steps and you can send your email with the invoice attached.

Other Options

During the above example, there were many variations of the steps not yet covered. The example was just a quick start to get a template up and running and how to use it.

This section will deal with all the ins and outs of the screens which you can use to manage your templates.

Save As New vs. Save Changes

Going back to the Email Templates screen:

When adding a new template, the button at the bottom will show “Save As New”. Obviously you are creating a new template so that is straight forward

Templates

Name:
If choosing Save As New, please provide a unique name for this template.

Subject:

Body:

B **I** **Styles** **Format** **Source**

Hello,

Dallas, TX 75204-7255

United States

body

However, if you select an existing template, there are a couple of new buttons:

Templates

body

First, you can bring up a template and remove it. It will permanently remove it. You will get a confirmation in case you click it by mistake:

Email Templates

Please confirm that you want to remove the template

Note there is now a button **Save Changes** as well as **Save As New**.

If you click Save Changes, it will do just that: save your changes. If you click Save As New, you will need to make sure you enter a NEW name for the template. Here I have added some text to my template. Now when I click Save As New, it will create a new template with that name.

Name:

IA conference New Name|

If choosing *Save As New*, please provide a unique name for this template.

That way you can save multiple variations of a template without having to start from scratch.

Be CAREFUL

Lets assume the following scenario:

- I intend to create a variation of an existing template.
- I selected the first one in the list which is named "IA conference".
- I modify the template and it takes me 20 minutes.
- I give the template a new name which is "IA conference Version 2".
- Instead of clicking ***Save As New***, I go to the top of the screen and change the drop down list from the current template ("IA conference") to "Add a new template".

OR...

I go to the top of the screen and choose any other existing template from the drop down list.

That last step will cause you to lose your work. By changing the drop down list the email template will be re-formatted to the default template or to whatever the template is you have chosen. **DON'T DO THAT.** You will lose all of your work. Just click ***Save As New***.

If you wonder why the screen works that way, there is no way of knowing when you change that drop down list if you intend to start from scratch or to start from another template.