DASH

USER GUIDE

EMAIL TEMPLATES

Contents

Prerequisite

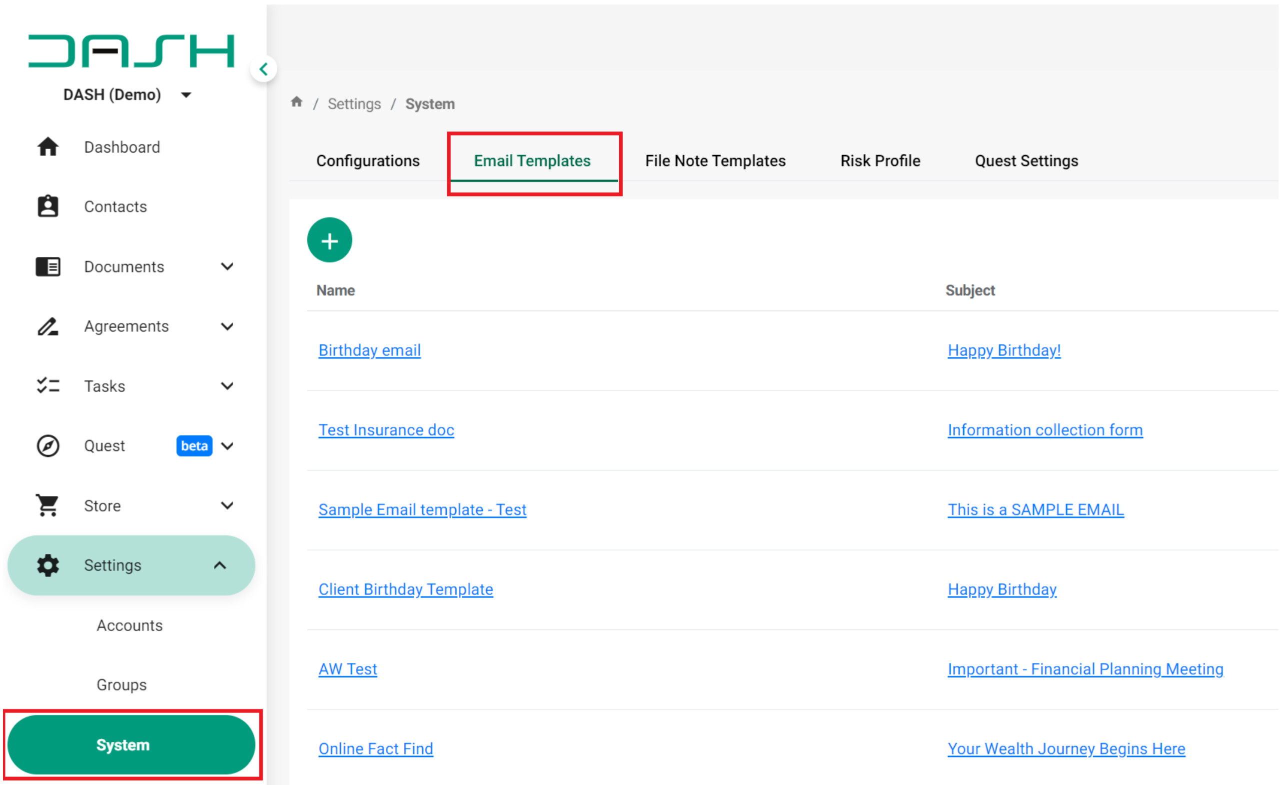
You will need the following if you are attempting to create or edit an email template:

- A DASH account with the role set as Admin or an account able to access Settings / System / Email Templates

1 Accessing Email Templates

Email Templates can be accessed in DASH by following the steps outlined below:

1. Click on **Settings** in the left-hand side menu
2. Click on **System**
3. In 'System', click on the **Email Templates** tab



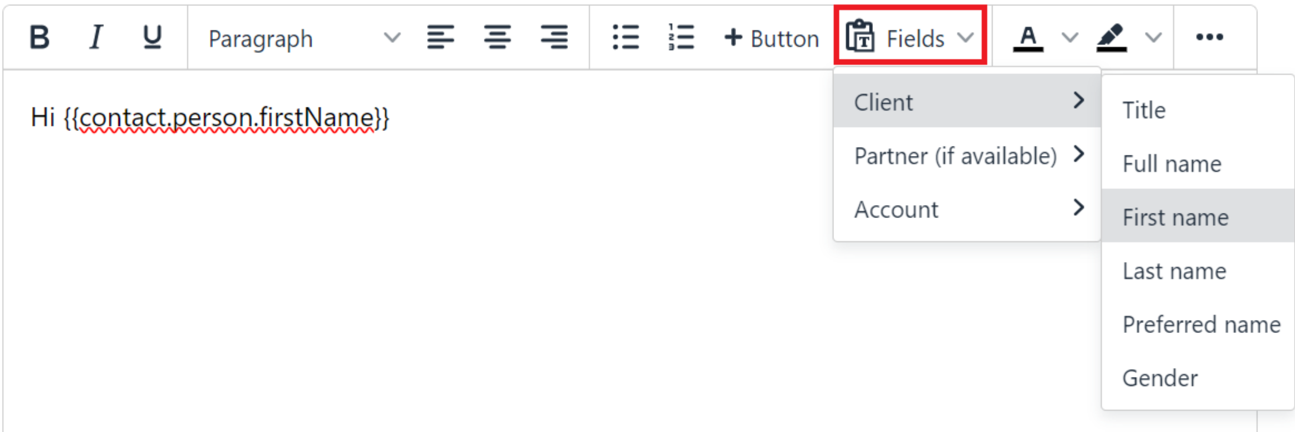
The 'Email Templates' tab is where you will be able to create new templates, view and edit existing templates and delete templates that are no longer required.

2 Email Template Coding

In the tables below you will find some code which you can add to the body of your email templates. The tables are split into two, **General** and **App Specific**. General codes can be applied to any other email templates that you may want to create, while App specific contains code that should only be applied to templates created to be used with an App such as Client Engagement and DynamicDocs.

General

In the toolbar you will see the **Fields** option. Clicking on that will display 3 menus; **Client**, **Partner (if available)** and **Account** (DASH user sending the email). In each menu there will be a list of items which you can choose to include in your email template such as a client's **First Name** and **Full Name**.



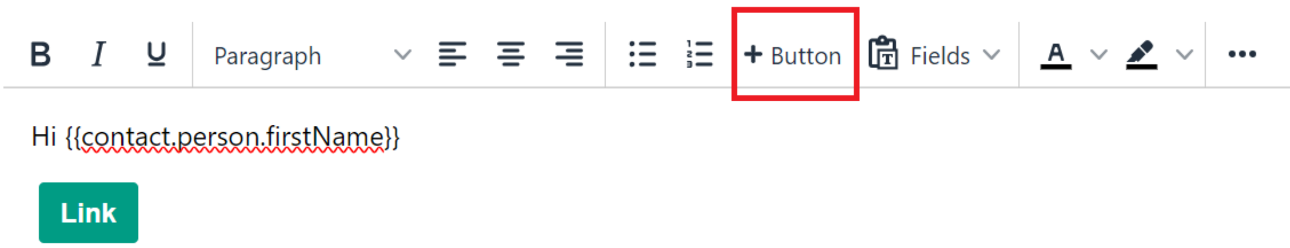
These general codes can be used in your templates to save some time editing when sending out emails. The code will pull the information when sent to the client so recipient will see something like "Hi John" or "Hi Jane".

App Specific - (Client Engagement or DynamicDocs)

Note: A button must be added to a template if it is going to be used to send either the Client Engagement or DynamicDoc to a contact.

For templates designed to be used in conjunction with an App such as the **Client Engagement** and **DynamicDocs** apps, a link is required for the user to get access to the Client Engagement or to view a DynamicDoc.

To include a button/link in your email template, you will need to use the **+ Button** function in the toolbar. This will allow you to add a button which will provide a link to the user which they can use to access the Client Engagement or DynamicDoc.



The text for the button is something that you can edit before it is added to the template. You do not need to reference or add any url for the button's functionality. When the email template is used within either Client Engagement or DynamicDocs app, a link will automatically be added to the button in the email sent out to the contact/client.

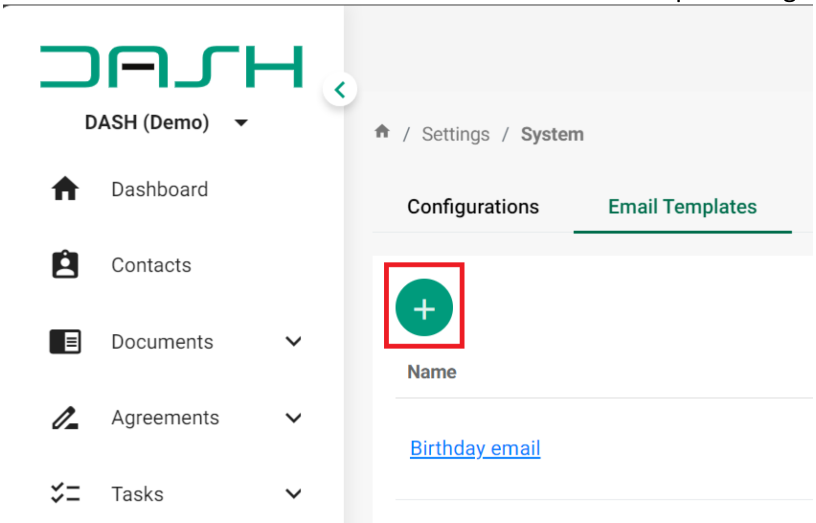
3 Creating Templates

Templates can be used to create a general framework that can help simplify and save you time composing similar emails repeatedly. When using a template you can still amend and edit the email so some level of personalisation can be done prior to sending the email to the contact/client.

You can refer to the previous section **'Email Template Coding'** where you will find some code that you can add to your template.

You can create a new email template by following the steps outlined below:

1. Click on **+** located on the left-hand side of the Email Templates Page



2. In the 'Email Template' window, complete the relevant fields

Field	Description
Name	- Enter a name for your template
CC	- Carbon Copy function where you can add an email that will also receive a copy when the email is sent - When using the CC function, the recipient will also be able to see the CC list of recipients - It is recommended that you CC or BCC yourself (or an email that you will use to record any emails being sent) for record keeping purposes.
BCC	- Blind Carbon Copy function, similar to BCC except only the sender can see the BCC recipient - Adding a BCC may be of use if you are looking to keep a record of communication
Subject	- Enter a subject for the template you are creating
Email Body	- Text box where you can enter the content that will appear in the body of the email - Works the same as if you were to send a regular email, just keep in mind that it a template may be used for multiple clients might be a good idea to avoid tailoring the text for a particular individual
Attachments	- This is where you can add an attachment to the template - When the template is used, any attachments will be sent across to the contact/client

3. Click **Save** once you are done

Note: There is no from field to specify what email address the emails are sent out from. Emails sent via DASH will be sent out from the <noreply@dash.com.au> email address. Previously there was a 'From' field was but as there was a greater likelihood of emails being sent to the junk folder, the emails from DASH will be sent from the noreply address to help mitigate that issue.

4 Template Management

In this section you will find information on the following areas:

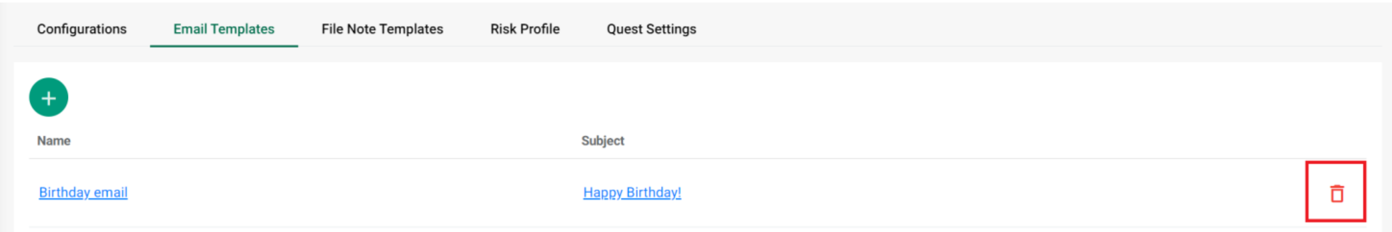
- Removing a Template
- Editing a Template

Note: The Email Templates tab is where you will be able to manage your email templates. You will need navigate to the 'Email Templates' (Settings / System / Email Templates) before following the instructions.

Removing a Template

You can remove a template by following the steps outlined below:

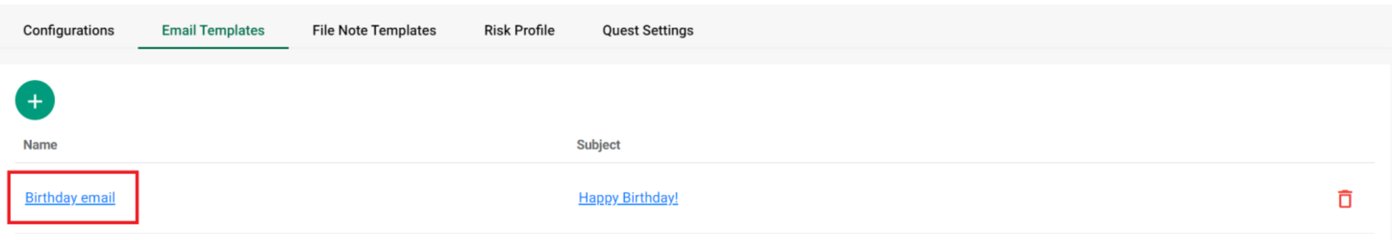
1. Click on **Delete Icon** for the template you would like to remove



Editing a Template

Perhaps you want to edit the formatting or perhaps you would like to make changes to the subject or email body. You can edit your email templates by following the steps listed below:

1. Click on the **Name** of the template you wish to edit



2. In the **Edit Email Template** window, make the necessary changes
3. Click **Update** once you are done

5 Sending Emails

Listed below are the various ways you can send emails in DASH:

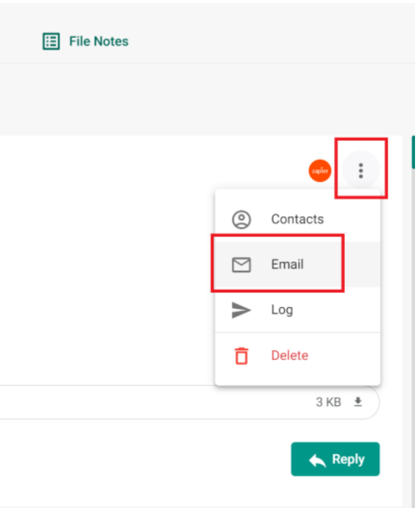
- Through File Notes
- Using Client Engagement App
- Document Generation Wizard
- Bulk Document Generation Wizard

Note: To keep a record of the emails you send, please ensure that you BCC yourself or an email address you are using to track what is being sent. The contents of the email being sent out will not be recorded inside of DASH so it is recommended that you BCC yourself.

Through File Notes

Individual emails can be sent through a contact's File Notes. You can send emails through File Notes by completing the following steps:

1. Click on **Contacts** in the left-hand side menu
2. In 'Contacts', select the relevant contact by clicking on their **name**
3. Click on the **File Notes** tab
4. Click on "three dots" and "Email"

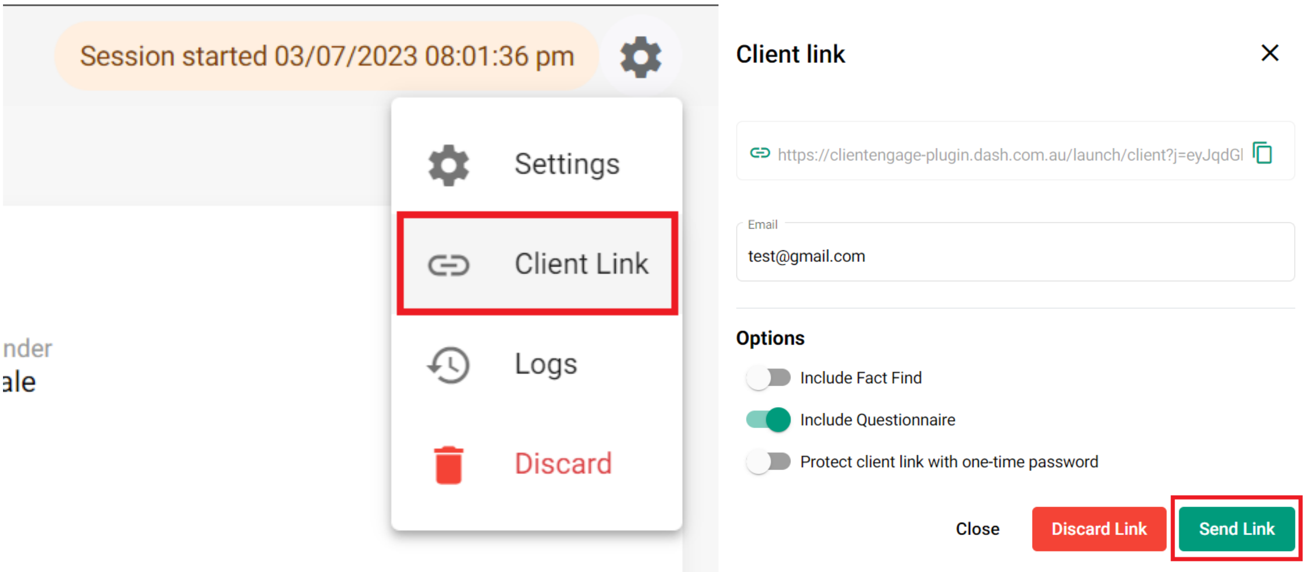


5. In the pop-up, you can select your email template and click "Send".

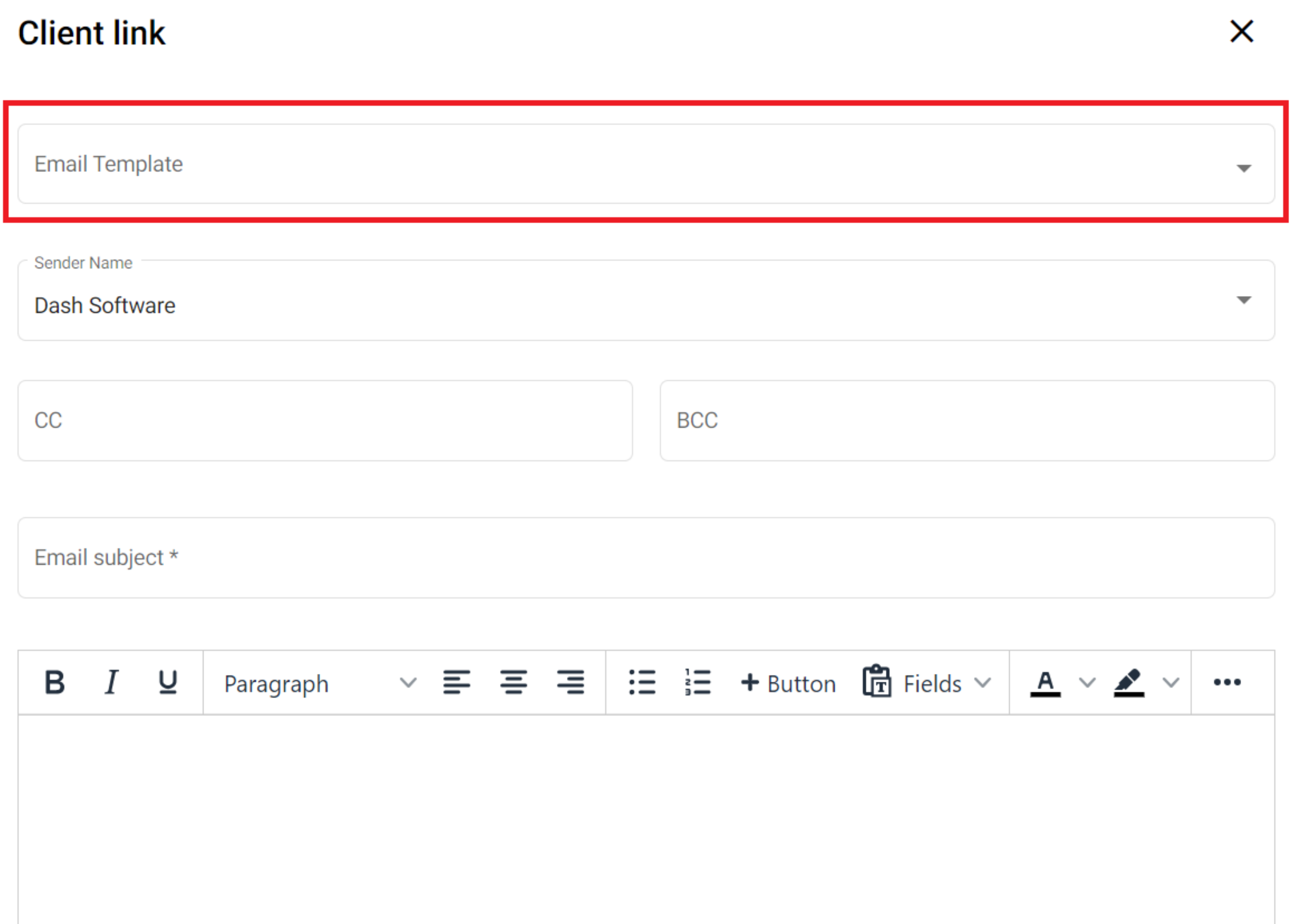
Using Apps

Emails can be sent out in our Apps like DynamicDocs and Client Engagement App. In this example, we will show you how to send an email in Client Engagement App.

In the Client Engagement App, you will click "Client Link" and then "Send Link".



You can choose the email template and click "Send Email".

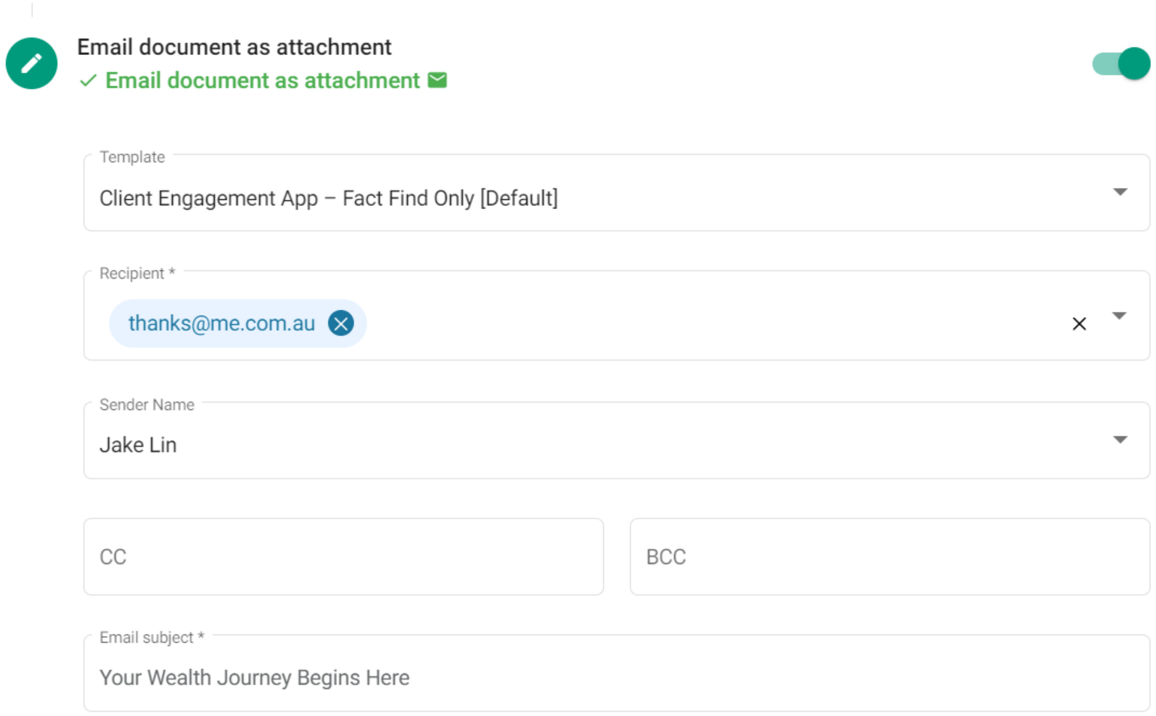


Document Generation Wizard

An email template can be selected and used within the Document Generation Wizard. This will allow you to send out an email to your client with the generated document, for instance a Fact Find Document as an attachment to the email. The email will be sent when the document has been successfully generated.

The option to send an email in the Document Generation Wizard can be found in the **Options** tab. See below for instructions on how you will be able to send an email with a generated document attached:

1. Ensure that the **Email document as attachment** switch is set to **ON**
   - The switch will be disabled if the contact does not have a recorded email address.
2. Select the appropriate template from the drop-down
3. Make any necessary changes to the Subject and Email Body of the template
   - You will be able to add email address to either the CC or BCC field if you haven't done so in the saved template. This will allow you to keep a record of the emails being sent to your client(s).
   - The generated document will be attached to the email in addition to any attachment(s) associated with selected email template.



Once you satisfied, you can proceed to generating the document. For more information regarding document generation, please refer to the **Document Generation Guide**.

Note: Emails sent via the Document Generation Wizard will be sent immediately if the document has been generated successfully. Please keep this in mind as you will not be able to review or edit the document prior to the sending of the email.

Bulk Emails Without Generating a Document

You can only send out bulk emails (using an email template) through the Bulk Document Generation Wizard. This means a document will be generated and attached to the emails you are sending out.

If you only wish to send out emails in bulk but without attaching a generated document (i.e. not using the Bulk Document Generation Wizard), then you can do so via MailChimp. You can refer to the **MailChimp User Guide** for more information.