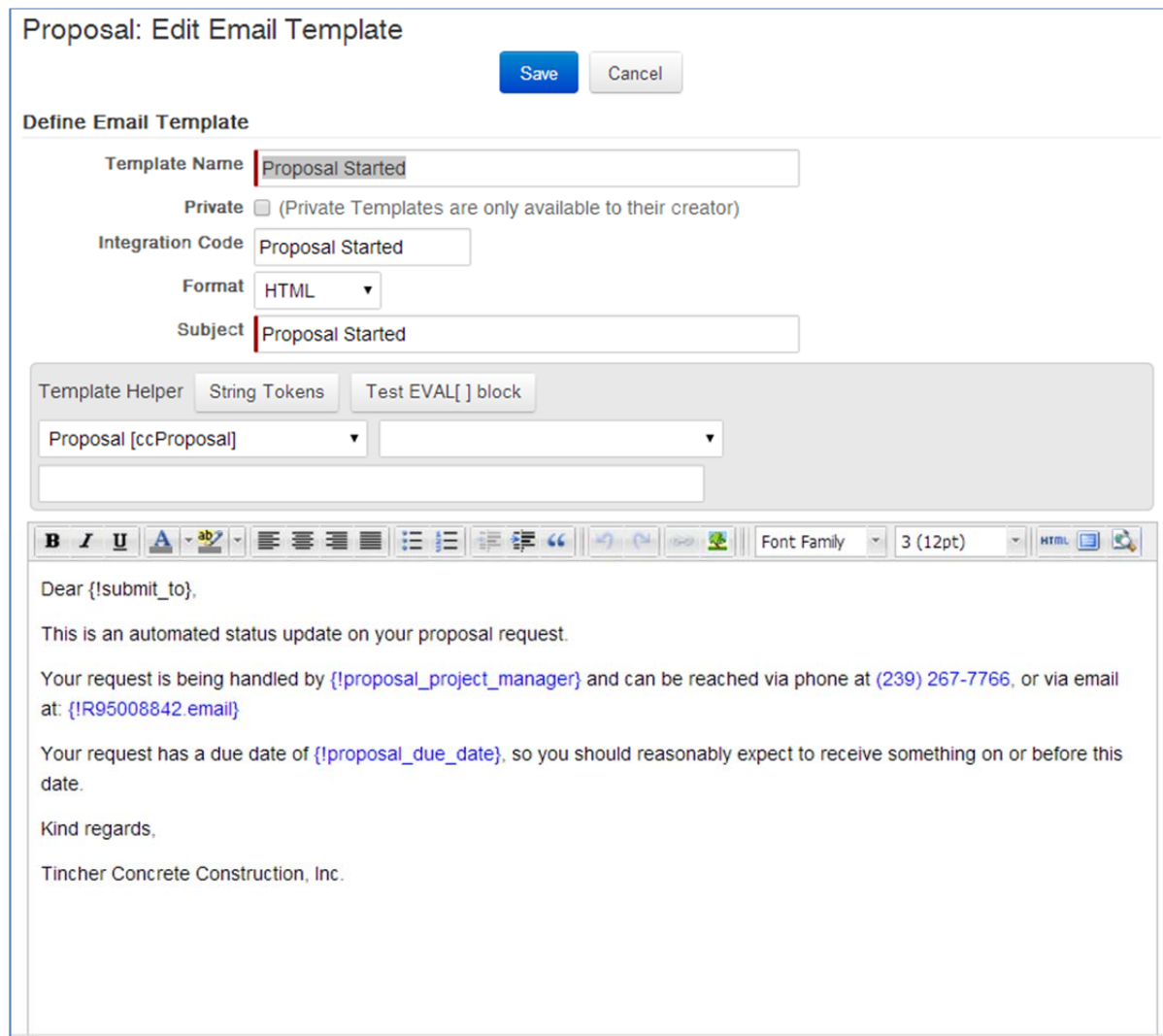


# Email Templates and Triggers

*Using these tools to automatically communicate with your customers.*

Email templates and triggers are very useful features to help you achieve maximum automation. In order to activate this feature, you must start with the email template. In this scenario, we want an auto-email to fire when a proposal gets created. Under the Proposal Object Definition, click on Templates, “New Mail Template”.



**Proposal: Edit Email Template** Save Cancel

**Define Email Template**

Template Name

Private  (Private Templates are only available to their creator)

Integration Code

Format

Subject

Template Helper String Tokens Test EVAL[ ] block

**B** **I** **U** Font Family  HTML

Dear {!submit\_to},

This is an automated status update on your proposal request.

Your request is being handled by {!proposal\_project\_manager} and can be reached via phone at (239) 267-7766, or via email at: {!R95008842\_email}

Your request has a due date of {!proposal\_due\_date}, so you should reasonably expect to receive something on or before this date.

Kind regards,

Tincher Concrete Construction, Inc.

In this example, we have named the template “Proposal Started” and chosen the format HTML. As before, simply find the merge tokens needed using the template helper and draft your email. As always, you have access to the fields of all related objects. Notice the email address comes from the related user. Remember, this is HTML, so you are free to include images and whatever other design elements you want. When you are finished, save the template.

## Create the Trigger

We will use a new trigger type for this one called "Send Email". Like the other triggers so far on this object, we'll fire it on "After Create".

### Proposal: Edit Trigger

[Save](#) [Cancel](#)

**Deployment Status**

This trigger is deployed

**General Properties**

When should this trigger run? In addition to this timing criteria, triggers can also be invoked from workflow actions of the type "Run Triggers".

Timing  Before Create  Before Update  Before Delete  On Finalize  
 After Create  After Update  After Delete

Type Send Email

Trigger Name

Integration Name

If you want this trigger to run only when a particular field changes value, select the field that should fire this trigger here. This option will only affect "Before Update" and "After Update" triggers.

On Field Change

**Trigger Properties**

Use Field

Enter the recipient email addresses here. Separate each address with a space " ". Use the selector above to insert merge fields for related email fields.

Reply To  User's Email Address  Default Address  Other

Send To

CC

BCC

Email Template

Give the trigger a name and fill out the Send To email address. The template helper (not shown here) is at the bottom of this screen. We have a field on the proposal object with the email for proposal submission. Apply that merge token in the Send To field and pick the Email Template we created in the previous step. Save your work.

In testing, it makes sense to use your own email as the destination for the email. Create a new opportunity, assign it to a user, and convert it into a proposal. You should receive the email in your inbox.

### Proposal Started

["Craig Ellis" + Add to Address](#)

▼ Sent By: "Craig Ellis" <noreply@progress.com> On: Apr 04/16/14 5:02 PM  
To: cellis2002@comcast.net  
Reply to: dmadatawiz@gmail.com

Dear Barney Rubble,

This is an automated status update on your proposal request.

Your request is being handled by [Craig Ellis](#) and can be reached via phone at (239) 267-7766, or via email at: [dmadatawiz@gmail.com](mailto:dmadatawiz@gmail.com)

Your request has a due date of [04/19/2014](#), so you should reasonably expect to receive something on or before this date.

Kind regards,

Tincher Concrete Construction, Inc.

A very nice feature also available is the “System Info” tab on the any particular screen. When viewing this new proposal, if I look at the System Info tab, I will see that an email was in fact sent when the proposal was created. If I click on the View link, I can view what it looks like merged.

