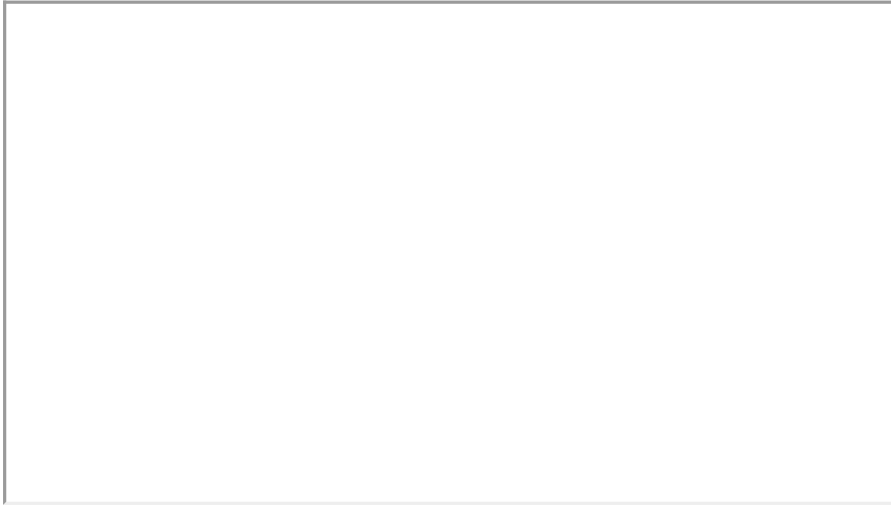


# Webinar - Emailing in All Orders

Last Modified on 07/20/2021 1:58 pm EDT



[VIEW ON YOUTUBE](#)

## Webinar Notes - Emailing in All Orders

- All Orders can potentially replace your Outlook setup.
- We can send emails directly from All Orders without being hooked into your Outlook or Gmail accounts.
- **Preferences > General > My Preferences > Email**
  - From Email, Name, Always CC, Always BCC, Signature Settings
- **Preferences > Sales Orders**
  - Prompt user to email document when new changes are saved
  - Use the email address on file for the shipping address instead of the billing address when emailing forms
  - **Features Tab > Enable Email Picker**
    - With this turned on you have access to contacts under a customer's info
    - You can set up a new contact for a customer just to send them an email from an order or a shipping document
    - When you go to send an email it will show a pop-up that lets you pick which email addresses to utilize.
      - These are all populated from the contacts under the customer.
      - You can set specific contacts so that they are the default for invoices / shipping / receiving
    - Contacts can be set to inactive/active
  - We can set up a Catch-All customer so that any email addresses will always show up in the email picker that you'd like. Contact support to get this set up!
- **Preferences > Email**
  - Send in HTML format
    - The system has the capability to allow you design a nice looking HTML email
  - Uncheck HTML format if you want to just send plain-text emails
- **Lists > Profile Lists > Sales > Custom Messages**
  - Originally created for internal memos in the system

- Allows you to setup canned templates and emails for your customers
- Set a Note Abbreviation
- Set a Custom Subject
- Within the Template/Body section there are specific placeholders or tokens that fill in automatically with information from the Document you are emailing from.
- **Use this KB Article to reference all the tokens you can add:**
  - **How To: Setting up templates for the subject and body of emails**
  - There is also an HTML sample template you can download.
- Create auto-filling Sales Receipt Emails / Invoice Emails and more
- You can set which documents correspond to which email templates.
- **Batch Emails**
  - Head to your Sales Order / Purchase Order / Ship Doc Lists
  - Check all the Documents you wish to batch email
  - Right Click and choose Send Email
- **Preferences > Shipping**
  - Auto email ship doc form when a ship doc is marked as shipped
    - Select the Form to send
  - It will automatically fire off when that status is changed
- **Preferences > Folders**
  - Set up your folders to have a central repository for all the attachments and emailed reports
  - You can select to retain copies of all emailed documents
  - Set it up on a network drive for all employees you wish to have access.
- **Integrate with MailChimp or other Email Platforms**
  - **Integromat**
    - MailChimp to Microsoft SQL Server
- **View Past Webinars**
  - **Past Webinars on the All Orders Knowledge Base**
- **The video for today's webinar will be up in a few days.**

For sales inquiries email: [kimk@numbercruncher.com](mailto:kimk@numbercruncher.com)

Toll Free **866-278-6243 X 335**

Direct Line **954-302-6335**

For suggestions on upcoming webinars email: [michael@numbercruncher.com](mailto:michael@numbercruncher.com)

As always, direct **support-related queries** to: [support@numbercruncher.com](mailto:support@numbercruncher.com)

---