# How To: Setting up templates for the subject and body of emails

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In All Orders, templates can be created to be used as the subject and body depending on the form or report being emailed. Here is how!

-Go to the Lists menu and then Profile Lists, Sales, Custom Messages.

-Here new "messages" can be created. The name will simply be an internal nickname that can be used for the template while the Template will be the body of the email and the subject will be the subject line of the email.

-At the bottom is a list of forms/reports in the system. Check the box for any form or report that you want to use this template for when it is being emailed.

-Tokens/Placeholder can be put into the template/body area and subject to be replaced every time an email is being sent. For example if you put the token [DOCNO] in the template/body it will be replaced by the actual document # when the email is being sent. Below is a file you can download with a list of available tokens/place holders.

-You can enter HTML into the template/body area as well for a nicely formatted email! Make sure when you are sending the emails you are setup to be sending them as HTML emails instead of plan text. This can be set within the main email preferences or with a checkbox each time the All Orders Send Email screen pops up for emails being sent. A sample invoice template with HTML and tokens can be downloaded from the file list below:

HTMLInvoiceSampleTemplate.txt 📎

TokenList.txt 📎

[Right-Click the links and click on "Save Link As" to save the txt files to your machine]