

Document & Email Wording (Edit)

This article describes how to Enter/Edit (Customise) the Default Document and Email wording. Default Document and Email wording populates to system Documents and Emails.


NOTE: Text that is contained within braces { } pull information from the system and should not be deleted or changed

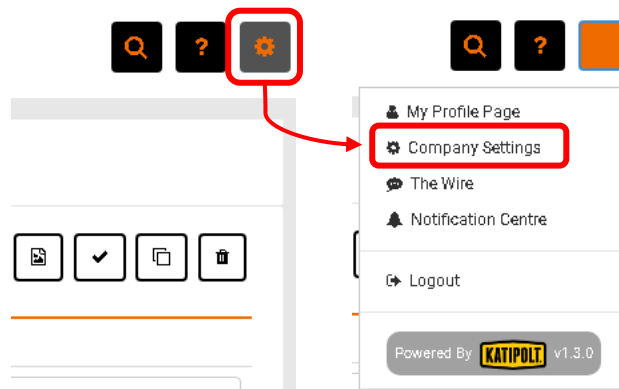
To Enter/Edit Document & Email Wording


Entering/Editing the Default Document & Email Wording is done from the DOCUMENT AND EMAIL WORDING Subnav of the Company Settings Editing window.

Quick Flow;

Company Settings > [Edit] > DOCUMENT AND EMAIL WORDING Subnav > Edit > [Save]

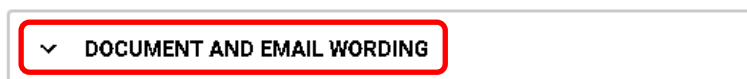
1. Press on the **Settings** button  to display the Options Menu, then Press on the **Company Settings** option to display the Company Settings Window





2. From the Company Settings Window, Press on the **[Edit]** button  to display the Company Settings Edit Window



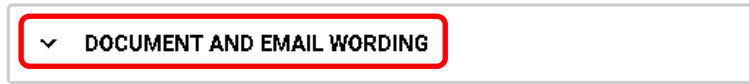
3. Scroll down and Press on the **DOCUMENT AND EMAIL WORDING** Subnav to expand





4. From the DOCUMENT & EMAIL WORDING Subnav **Edit** the required field(s)
5. When finished Entering/Editing the data, Press the DOCUMENT & EMAIL WORDING Subnav's **[Save]** button  to save entries, then Press the Company Settings Edit Window's **[Save]** button  to save entries


To reset and return Document & Email Wording to system default

1. From the Company Settings Window, Scroll down and Press on the **DOCUMENT AND EMAIL WORDING** Subnav to expand




2. From the DOCUMENT & EMAIL WORDING Subnav, Press on the [Return ALL] button  to return all wording to system default, OR Press on the individual wording's [Return XXXX] button  to return that wording to system default

^ DOCUMENT AND EMAIL WORDING

RETURN TO SYSTEM 

QUOTE WORDING

Quote Introduction	Thank you for allowing {0ppportunity__r:PartnerAccount.Trading_As__c} the opportunity to price on your requirements. Please review following breakdown of allowances, quotation acceptance form MUST be signed & returned before any quoted works will proceed.	
Quote Ending	We trust this quotation is to your satisfaction and look forward to your response. If you have any queries regarding the above please do not hesitate to contact me. Yours Sincerely {0ppportunity__r:PartnerAccount.User_Signature__c} {0ppportunity__r:PartnerAccount.User_Name__c} {0ppportunity__r:PartnerAccount.Trading_As__c}	