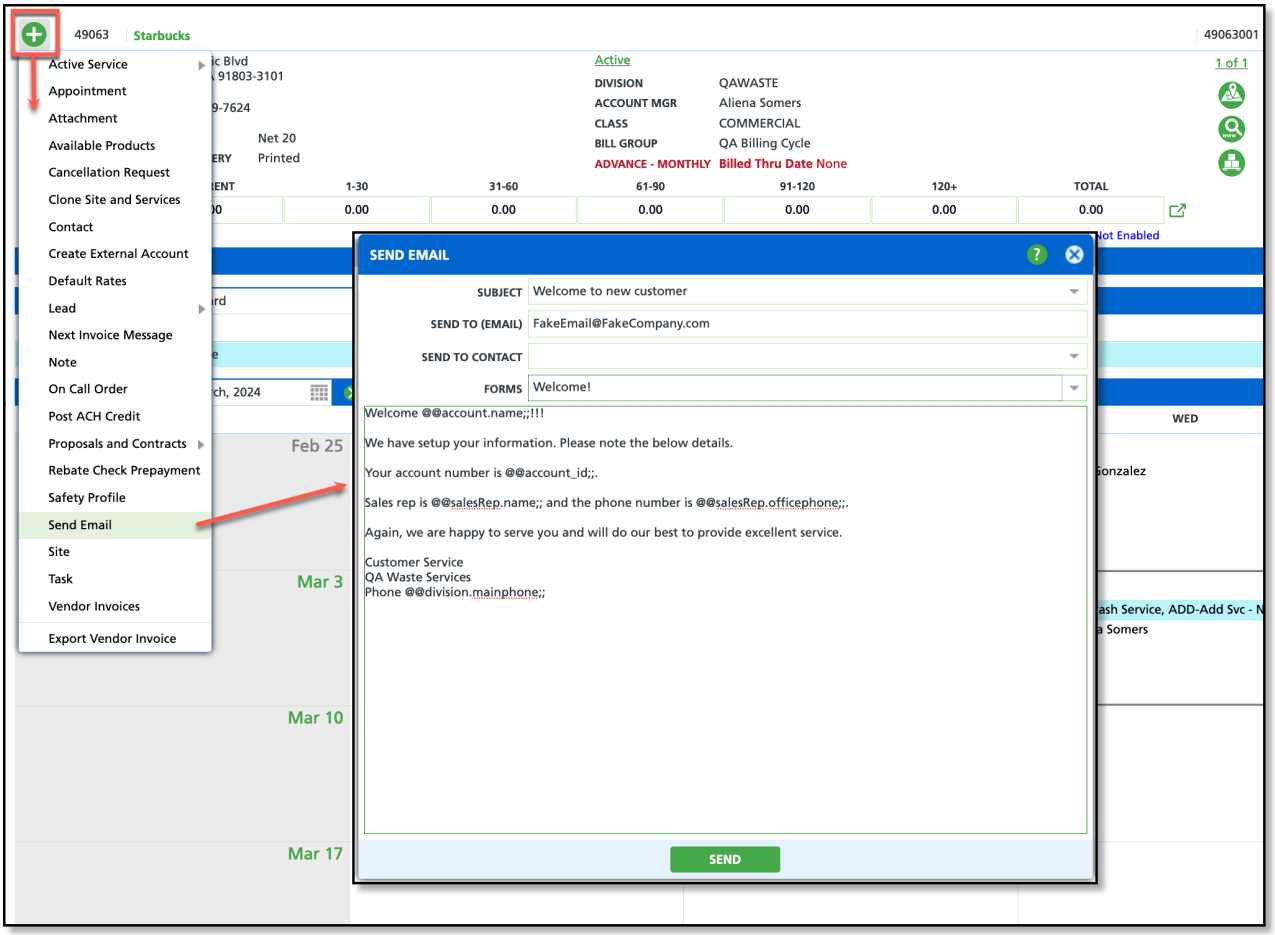
Send Email

Last Modified on 06/25/2026 7:27 am PDT

Pathway: *Accounts > Search: Account > Account Menu > Send Email*

In the account menu drop-down of the Customer Service screen, the *Send Email* feature allows users to directly email account contacts or others for reasons regarding their account. This feature provides the option to use a pre-built email template, or compose a custom email message.



Permissions

The following permissions are required to use the Send Email feature:

Permission ID	Permission Name
5	View Account
6	View Site
42	Send Email
43	Email Form

Field Descriptions

Field purpose and logic can be reviewed here:

Field	Description
Subject	Displays a list of available templates. Field does not populate if a template does not exist.

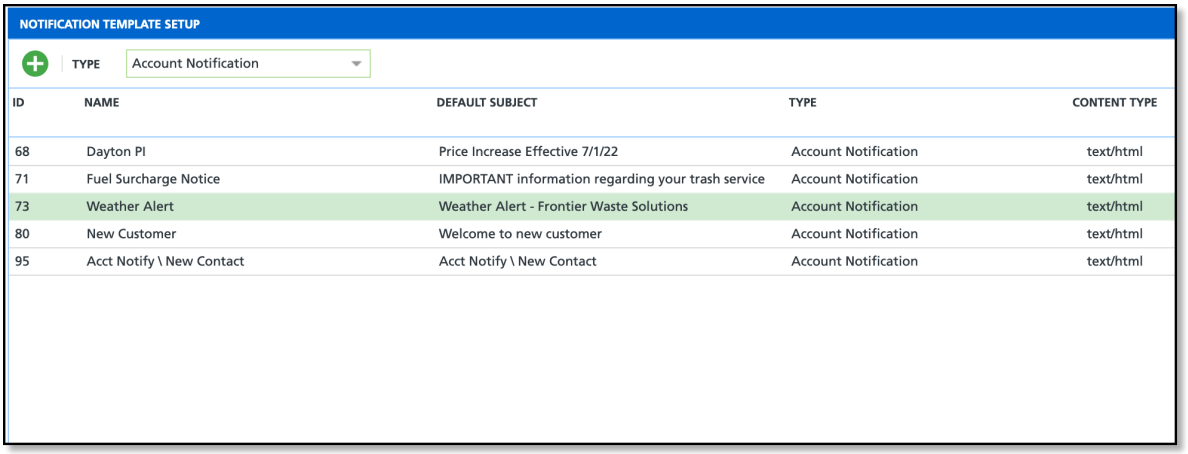
Sent To (Email)	Field to enter the recipient's email address.
Email to Contact	Option to select a name of an account contact to send the email to.
Forms	Option to attach a form to the email. Forms must be added in*Setup > System > Email Attachments* to display in the Forms drop down.

Template Setup

Pathway: *Setup > System > Notification Template*

Templates offer a straightforward and effective approach to sending email communications to both active and prospective accounts, covering frequently sent message types. These templates are created within *Setup > System > Notification Template* and are organized based on their 'Type' to specify where they can be utilized. The "Send Email" function includes templates assigned with the following template types:

- Account Notification
- Future Services
- Online Survey
- Other
- Site Notification



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