



# Email Settings

Help Guide

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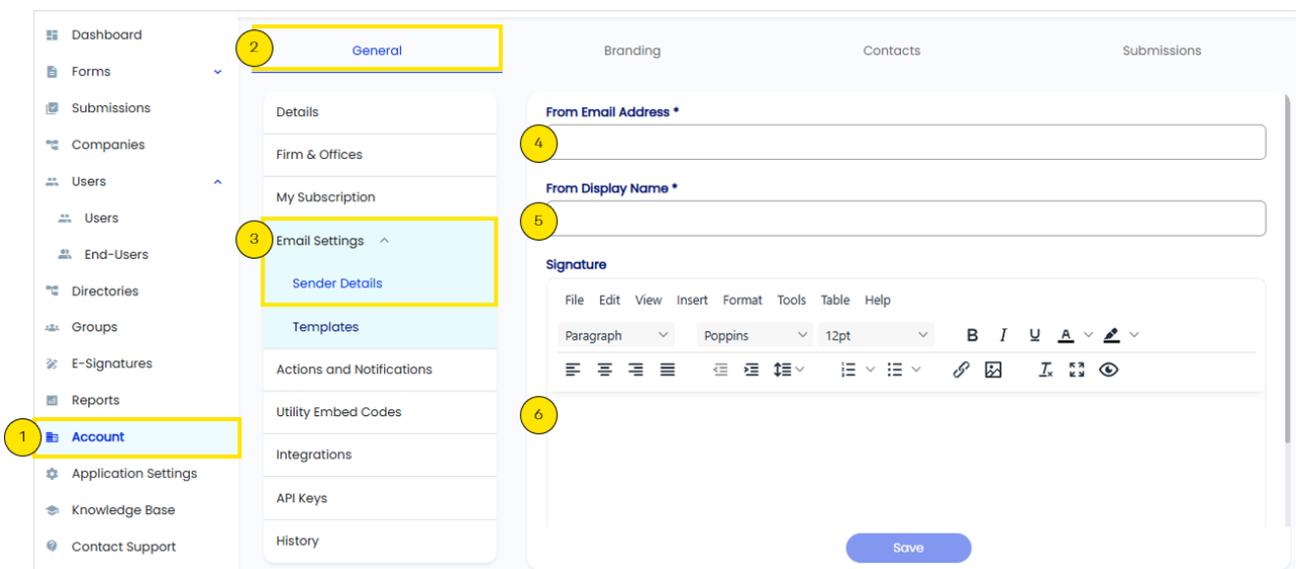
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## 1. Open the Email Settings

### 1.1 Edit Email Settings

To modify the emails that are sent through Smarter Drafter:

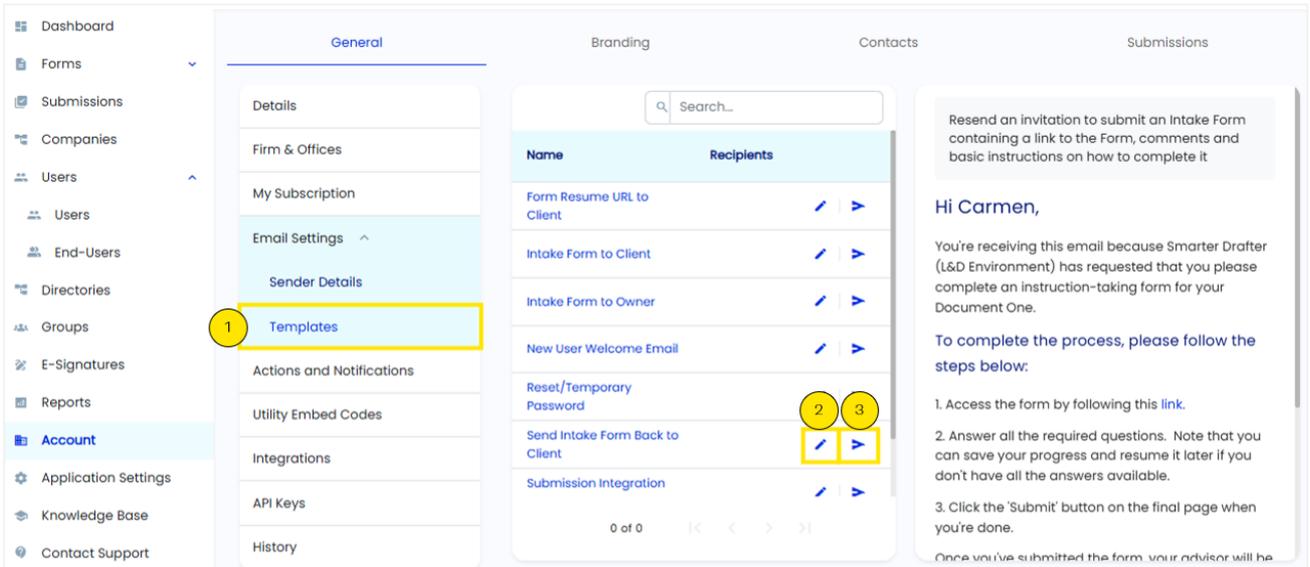
1. Click **Account** in the navigation menu.
2. Click the **General** tab.
3. Open the **Email Settings** menu and click **Sender Details**.
4. In this space, you can set the **From Email Address** – this email will appear as the sender’s email address when an email is received from Smarter Drafter.
5. The **From Display Name** field allows you to add a name that will appear as the sender of an email that comes from Smarter Drafter.
6. You can add a **Signature** to the email, and format it with the formatting tools.



## 1.2 Review the Template

Now that you have set up the email, it's time to review the templates:

1. Click **Templates**. All of the email templates that are in use will populate the list.
2. To edit any of the email templates, click the pencil shaped edit button. This will open the editor.
3. To send a preview, click the arrow shaped send button, and the email will be sent to the address recorded in your Account details.



The screenshot displays the Smarter Drafter user interface. On the left is a navigation sidebar with categories like Dashboard, Forms, Submissions, Companies, Users, End-Users, Directories, Groups, E-Signatures, Reports, Account, Application Settings, Knowledge Base, and Contact Support. The 'Account' section is expanded, and the 'Templates' option is highlighted with a yellow box and a circled '1'. The main content area is divided into four tabs: General, Branding, Contacts, and Submissions. The 'General' tab is active, showing a list of templates. The list has columns for 'Name' and 'Recipients'. The 'Send Intake Form Back to Client' template row has a pencil icon (circled '2') and a right-pointing arrow icon (circled '3'). To the right of the list is a preview of an email. The email preview shows a header 'Hi Carmen,' followed by a message: 'You're receiving this email because Smarter Drafter (L&D Environment) has requested that you please complete an instruction-taking form for your Document One.' Below the message are three numbered steps: 1. Access the form by following this link. 2. Answer all the required questions. Note that you can save your progress and resume it later if you don't have all the answers available. 3. Click the 'Submit' button on the final page when you're done. The preview also includes a note: 'Once you've submitted the form, your advisor will be...'