

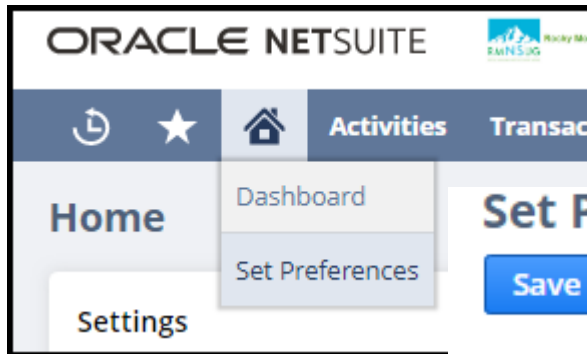
Creating a Professional Signature for Emails Sent from NetSuite

From SuiteWorld On Air 2022 (session ADM1625SES)
RMNSUG - November 16, 2022



Margie Komninos
NS Administrator
PlantScan Corporation
mkomninos@plantscan.com

Under Home > Set Preferences



Set Preferences

General Appearance Transactions Analytics Activities Alerts

User Profile

NICKNAME

This setting applies to all your roles.

FROM EMAIL ADDRESS

This setting applies to all your roles.

SIGNATURE

This setting applies to all your roles.

ADD SIGNATURE TO MESSAGES

Signature box can use HTML tags

Check this box if you want to add your signature to all outgoing email messages.



Sending Email Looks like this ... NOT very professional

Test Default Signature

RMNSUG BOD <Sponsorship@rmnsug.org>

Test to see what the signature look like by default.

Margie Komninos RMNSUG BOD Sponsorship/Membership Chair sponsorship@rmnsug.org 303-333-3333

You might be emailing Invoices to customers, POs to vendors, or some other type of email

Wouldn't this be much better?

Test with HTML signature

RMNSUG BOD <Sponsorship@rmnsug.org>

Testing again with new signature

Margie Komninos

RMNSUG BOD

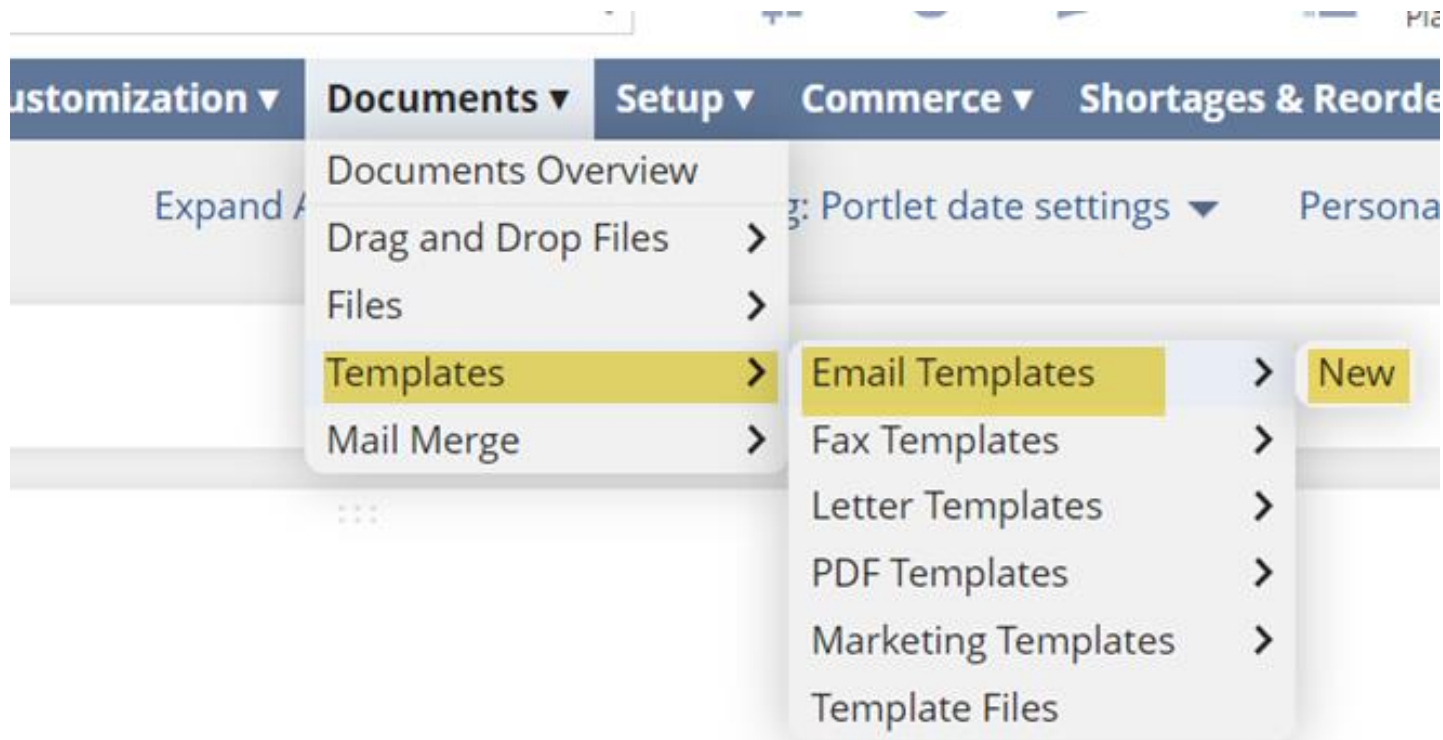
Sponsorship/Membership Chair

sponsorship@rmnsug.org

303-333-3333

No need to learn HTML to do this one

Documents > Templates > Email Templates > New



Role needs the **Lists > Email Template** permission

Enter in text - format (don't save yet)

The screenshot shows the 'Email Template' editor interface. At the top, there are buttons for 'Save & New', 'Cancel', 'Change ID', and 'Actions'. Below these are fields for 'ID' (custemailtmpl_494_931396_915) and '* NAME' (Margie Signature). A 'RECORD TYPE' dropdown menu is present, with a red arrow pointing to it and the text 'leave blank'. Below the form is a dark blue header bar with tabs for 'Template', 'Restrict Access', and 'Marketing'. Underneath is a 'SUBJECT' field. A dropdown menu is open, showing 'to view HTML code' with a red arrow pointing to it. Below the dropdown is a 'TEXT EDITOR' section with a 'FIELD TYPE' dropdown and an 'INSERT FIELD' button. A rich text editor toolbar is visible, with a red arrow pointing to it and the text 'formatting tools'. The toolbar includes icons for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar, the email content is displayed: 'Margie Komninos', 'RMNSUG BOD', 'Sponsorship/Membership Chair', 'sponsorship@rmnsug.org', and '303-333-3333'.

Save & New | Cancel | Change ID | Actions | StickyNotes | New: [pink] [yellow] [green]

ID: custemailtmpl_494_931396_915

* NAME: Margie Signature

RECORD TYPE: [dropdown]

leave blank

Template | Restrict Access | Marketing

SUBJECT: [field]

to view HTML code

TEXT EDITOR

FIELD TYPE: [dropdown]

INSERT FIELD: <Type then tab>

Source | [icons]

Styles | Format | Font | Size | [icons]

formatting tools

Margie Komninos
RMNSUG BOD
Sponsorship/Membership Chair
sponsorship@rmnsug.org
303-333-3333

Click on Source button, copy, then SAVE

Email Template

Save & New | Cancel | Change ID | Actions | StickyNotes | New:

ID custemailtmpl_494_931396_915

* NAME Margie Signature

RECORD TYPE ▼

Template | Restrict Access | Marketing

Source | | Styles | Format | Font | Size |

```
1 <strong>Margie Komninos</strong><br />
2 RMNSUG BOD<br />
3 Sponsorship/Membership Chair<br />
4 sponsorship@rmnsug.org<br />
5 303-333-3333
```

Recommend saving so you can make changes as needed

Back to Set Preferences and paste

Set Preferences

Save

Cancel

General

Appearance

Transactions

Analytics

Activities

Alerts

Restrict View

User Profile

NICKNAME RMNSUG BOD

This setting applies to all your roles.

FROM EMAIL ADDRESS Sponsorship@rmnsug.org

This setting applies to all your roles.

SIGNATURE `Margie Komninos
RMNSUG BOD
Sponsorship/Membership Chair
sponsorship@rmnsug.org
303-333-3333`

This setting applies to all your roles.

ADD SIGNATURE TO MESSAGES

Wouldn't this be much better?

Test with HTML signature

RMNSUG BOD <Sponsorship@rmnsug.org>

Testing again with new signature

Margie Komninos

RMNSUG BOD

Sponsorship/Membership Chair

sponsorship@rmnsug.org

303-333-3333

No need to learn HTML to do this one

Review of Steps

1. Go to Home () > Set Preferences

- Make sure ADD SIGNATURE TO MESSAGES is checked
- If there is an existing signature then copy it so you can to paste and format in next step

2. Go to Documents > Templates > Email Templates > New

- Name your signature
- Leave subject blank
- If you copied text from the signature box then paste it in the text editor and enter new text
- Format using the WYSISYG tools
- Click on **Source** button
- Copy all lines
- Save

3. Go to back to Home > Set Preferences

- Paste into signature box the source code from prior step
- Save

Note: Could also create email templates to use for your invoices, POs or anything else that includes the signature.

Message with Image and Link to Website

RMNSUG BOD <Sponsorship@rmnsug.org>

to margery.komninos, me ▾

Test with image and link to RMNSUG

Margie Komninos

RMNSUG BOD

Sponsorship/Membership Chair

sponsorship@rmnsug.org

303-333-3333



Rocky Mountain NetSuite User Group

[Upcoming Meeting](#) [Posts](#) [Meeting Sponsorship](#) [New Member Registration](#)

[Meet The Board](#) [Contact Us](#) [LinkedIn Forum](#)

Date: November 16, 2022
Time: 8:30 a.m. – 12:00 p.m. MDT
Supply Chain Process and Inventory Management
[Meeting Details and RSVP](#)

This will be an Online-Only Meeting!

Meeting Sponsor:



Margie Komninos

NS Administrator

PlantScan Corporation

mkomninos@plantscan.com