Email Templates

The covering emails Deep Space sends with your documents: how they are chosen, filled, sent and checked

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When you send a progress claim, payment schedule, tax invoice, variation, subcontract agreement or purchase order, Deep Space emails it with a **covering email**. The covering email comes from an **email template**: a subject and an HTML body with `${variables}` that are filled from the record when you send. This guide covers:

- how an email template is matched to a document, and where you manage them;
- every email type, and when each one is sent;
- the standard emails every workspace gets, and how they stay up to date;
- variables, the safeguards that stop a broken email going out, and how to check what was sent.

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1. The one rule

> **An email template is matched to a document by category + type.** The email for a document template of type `subcontract_rcti` must also be category `commercial`, type `subcontract_rcti`, and **Active**. Only one Active email template per category and type is used.

This rule explains most questions. If the wrong email appears when you send, or none appears, the email template's type almost always doesn't match the document being sent, or it isn't Active. The type of every document is listed in §12.

2. The Email Template Library

Admin → Email Template Library, *Email* tab. The list is on the left; the selected template is on the right.

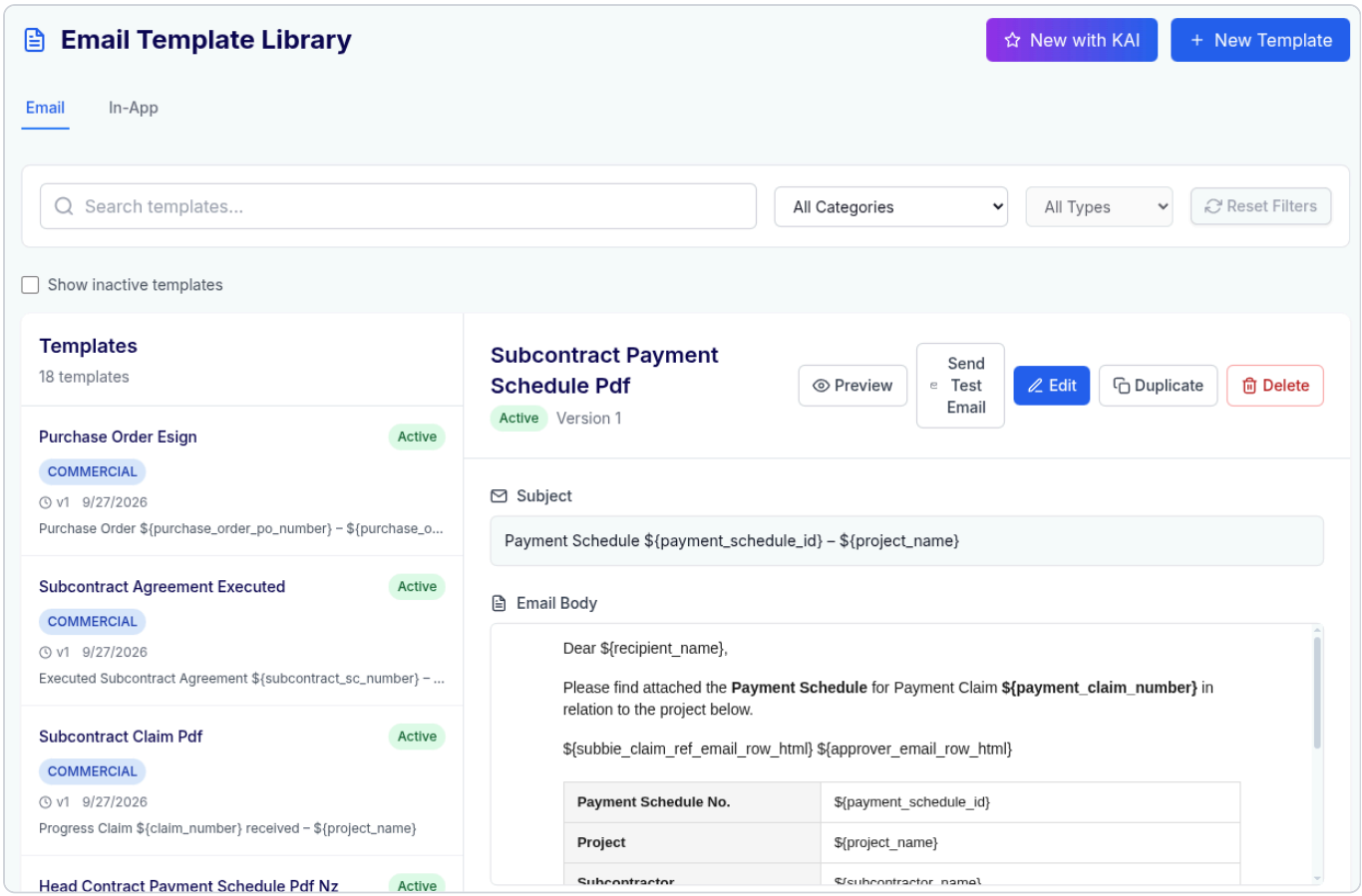


Figure 1. The library with the standard subcontractor payment schedule email selected: subject, body with `${variables}`, and Preview, Send Test Email, Edit, Duplicate and Delete.

Field	What it does
Subject	The subject line. Takes variables. It is plain text: values appear exactly as written.
Email Body	HTML. Takes variables. Switch between *HTML Source* and *Preview* while editing.
Category / Type	Must match the document's category and type (§1). The library shows the type in words ("Subcontract Payment Schedule Pdf"); the key is `subcontract_payment_schedule_pdf`.
Status	Active or inactive. Inactive templates are never used. Tick *Show inactive templates* to see them.
Locale	Leave as English.
Required Fields	Generated from the variables in the subject and body; refreshed when you save.

Actions

- **New Template** (or **New with KAI** to draft one) creates a template. Saving a second Active template for the same category and type asks *"Replace active template?"*; **Replace & activate** makes the new one active and deactivates the old one.
- **Edit** changes the subject, body or status. Saving takes the template over from the standard copy (§4).
- **Duplicate** copies a template, which is a safe way to draft a change.

- **Send Test Email** fills the variables with values you type and sends the result to **you only**. To show someone else, forward it from your inbox.

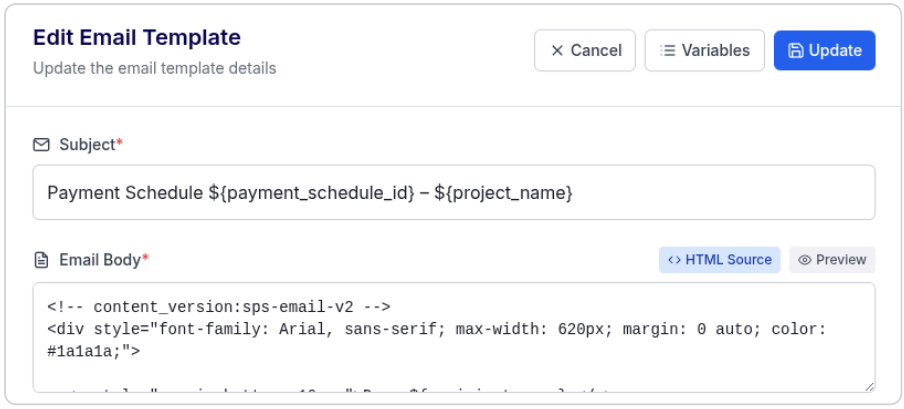


Figure 2. Editing a standard email. The first line of the HTML source is its hidden version marker, `<!-- content_version:sps-email-v2 -->` (§4).

Known issue. The editor's *Type* list does not yet include most document types (for example `subcontract_payment_schedule_pdf` or `head_contract_tax_invoice`). Opening Edit on those emails shows "Select a type", and the change can't be saved. Choosing a different type would unbind the email from its document. Until this is fixed, don't save them with another type; ask Deep Space support to change a document email's wording.

3. Which email goes with which document

Each send path uses the email type of the document being sent. Emails from the Send dialog attach the PDF; signature requests carry a secure link instead.

Email type	Sent by	Recipients start as
`head_contract_claim_pdf`	Progress Claims to Client → Generate & Send (PDF attached)	The client's contacts from the directory
`head_contract_progress_claim`	The claim tax-invoice layout. No register sends it yet	—
`head_contract_payment_schedule_pdf` / `_nz`	Client Payment Schedules → Generate & Send	Typed in step 3
`head_contract_tax_invoice`	Invoices (to Client) → Generate & Send	Typed in step 3
`head_contract_variation`	Variations (VO) → Generate & Send	Typed in step 3
`subcontract_claim_pdf`	Progress Claims from Subcontractors → Generate & Send (acknowledging the claim)	Typed in step 3
`subcontract_payment_schedule_pdf` / `_nz`	Payment Schedules (Issued) → Generate & Send; **automatically** on Accept (if ticked) and when internal approval completes	The subcontract's saved send settings (§7)

`subcontract_rcti` / `subcontract_bcti`	Payment Schedules (Issued) → Generate & Send, RCTI/BCTI chosen in step 1	The subcontract's saved send settings
`subcontract_variation`	Subcontract Variations → Generate & Send	Typed in step 3
`subcontract_agreement`	Subcontract Register → Send to Subcontractor, and Resend Signing Link (signature request with the signing link)	Typed; the first recipient is the signer
`subcontract_agreement_executed`	Resend Agreement on an executed subcontract (7-day link to the signed copy)	Typed in step 3
`purchase_order`	Purchase Orders → Send to Supplier / Resend / row "Send document" (PDF attached)	The supplier's main contact
`purchase_order_esign`	Purchase Orders → Send for E-Signature (signing link)	The supplier's main contact
`subcontract_payment_schedule_approved`	Automatic, when an approved schedule has no stored document to send: a notice without a PDF	Saved send settings

Emails that are not edited in the library

- **Approval requests** ("Approval needed: …") and approval outcomes, from your approval workflows.
- **Daily reminders** for client variations that are awaiting approval.
- **The executed-agreement notice**: when every party has signed a subcontract, each signatory gets the signed PDF. It is sent from the connected mailbox of the user who opens the Agreement tab next.
- The e-sign service's own completion email to the signer.

4. Standard emails and updates

Every workspace gets a standard email for each document type. It is created automatically when it is missing, the first time Admin → Document Templates is opened (subcontract and purchase order emails are also created the first time you use them).

- **Version markers.** Each standard email carries a hidden marker in its body, such as `<!-- content_version:sps-email-v2 -->`. It never appears in the sent email.
- **Unedited copies are refreshed.** When Deep Space improves a standard email, the next visit to Document Templates updates every copy that is still unedited to the new wording and subject.
- **Your edits are kept.** Saving your own change in the library removes the marker. From then on the email is yours and is never overwritten. A template you created yourself is never touched.

Recent improvements that reach unedited copies this way: payment schedule subjects no longer say "Issued" (so they read correctly for a Draft schedule), and the subcontract signature request points to the signing link, where the full agreement pack can be read and downloaded, instead of saying it is attached.

5. Variables in emails

Use `${variable_name}` in the subject and body. The *Variables* panel in the editor lists what is available for the selected type. The *Document Template Variable Dictionary* lists every variable per document type; email templates use the same names. When an email is sent, variables are filled from:

1. the record's values that Deep Space resolves (claim, schedule, invoice, variation, subcontract or PO);
2. the values the Send dialog passes, the same ones used to generate the PDF;
3. built-in values available in every document email.

Built-in variable	Filled with
`${recipient_name}`, `${recipient.email}`	The first recipient's name, or their email if no name was entered
`${sender_name}`	The sender's name (see the known issue in §11)
`${current_date}`, `${current_year}`	The date of sending
`${pdf_download_link}`	A link to download the attached PDF, valid for 7 days. If an email doesn't use it, a *Download PDF* button is added at the end automatically

Email-only rows

Some variables exist only for emails. Each one prints a whole table row, or nothing at all when it doesn't apply:

- `${approver_email_row_html}` (payment schedules): the "Approved By" row, left out while the schedule is still Draft.
- `${subbie_claim_ref_email_row_html}` (payment schedules): the subcontractor's own claim reference row, left out when the claim has none.

How values print

- **Blank values print nothing.** A field that is empty on the record is sent as blank and never blocks the email.
- **Values print exactly as entered.** Characters such as `&` and `<` in a company name or description appear as typed; they are never treated as formatting.

6. Sending: the email step

In the Send Document wizard, step 1 is the document, **step 2 is the email** and step 3 is the recipients. Step 2 lists the Active email templates whose type matches the document chosen in step 1, with a preview button on each.

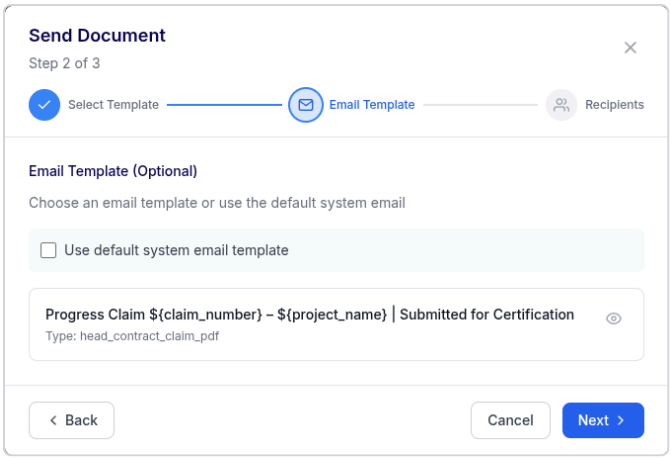


Figure 3. Step 2 on a progress claim: the Active `head_contract_claim_pdf` email.

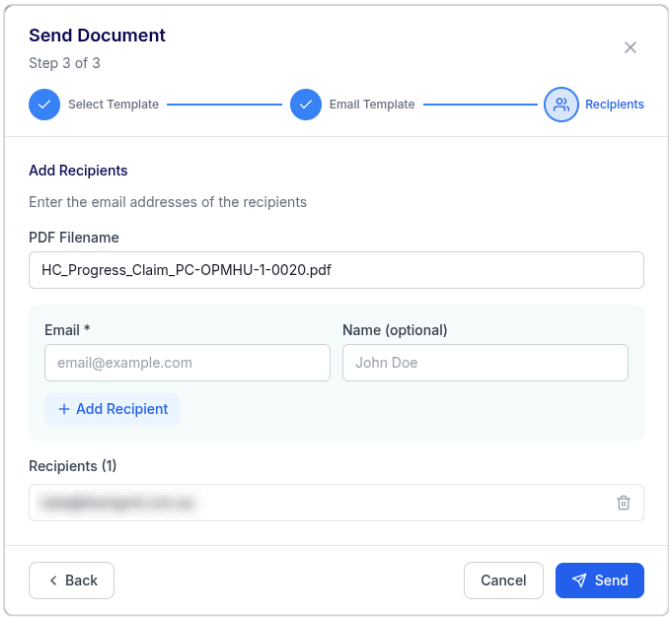


Figure 4. Step 3: the PDF filename, and recipients (pre-filled from the client directory here).

- Pick a template, or tick *Use default system email template*. Either way, the workspace's Active email for the document type is used unless you pick another.
- Subcontract agreement sends use their own wizard with the same three steps, and *Use default signing notification email* / *Use default executed-agreement email*.

7. Recipients and saved settings

- **Recipients:** add each email (and an optional name) in step 3. Every recipient receives the email. There is no separate CC field: add everyone who should get it as a recipient.
- **PDF filename:** step 3 also sets the attachment's file name.
- **Pre-filled recipients:** progress claims start with the client's directory contacts, and purchase orders with the supplier's main contact.
- **Saved send settings (subcontractor payment schedules):** recipients and the email template are saved per subcontract. Set them with *Document Sending Settings* from the Accept or Submit for Approval prompts; every successful manual send updates them too. The automatic sends on Accept and on approval use them, and the RCTI/BCTI sends start from them. Submitting a schedule for approval with no saved recipients warns that approval will not be able to notify the subcontractor.

8. What the recipient gets

- The subject and body with every variable filled.
- The PDF attached, plus a 7-day download link or button.
- It comes from your **connected mailbox** when you have connected one (Admin → Email Integration), so replies come back to you. Otherwise it comes from `notifications@notify.deepspacesync.com`.

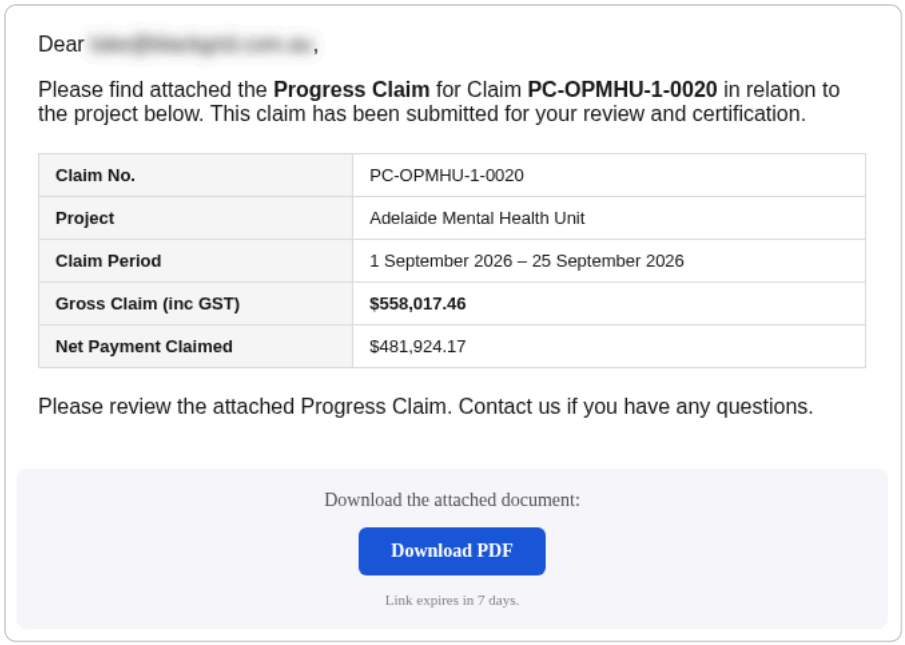


Figure 5. A progress claim email as received (standard `head_contract_claim_pdf` email, test workspace; recipient blurred, sign-off cropped). The Download PDF button was added because the template has no `${pdf_download_link}`.

9. Safeguards: when an email is not sent

Safeguard	What happens
Unfilled variable (before sending)	If the chosen email uses a `${name}` that nothing fills for this record (often a typo such as `${compamny_name}`), step 3 shows an amber notice and **Send is disabled**. Pick another email template, use the default, or fix the template. The email does not go out with the raw `${…}`.
Unfilled variable (at sending)	If an email still contains a `${…}` when it is being sent (for example from an automatic send), it is **not sent**. The Notification Log shows it as Failed with *"Unresolved template variable(s): … — nothing was sent"*.
No document	If the PDF can't be generated, nothing is emailed: *"Could not generate the PDF … Nothing was sent."*
Company Settings incomplete	A document missing a required Company Settings value is not produced or sent (see the *Document Templates* guide).
Internal approval	A Draft claim or variation awaiting internal approval can't be sent.

10. The Notification Log

Admin → Notification Log, *Email* tab, lists every email this workspace sent, including document emails: when, category, type, recipients, status and who triggered it. Filter by category, type, status, project and date. Open a row to see the recipients and, for a failure, the **Last error**.

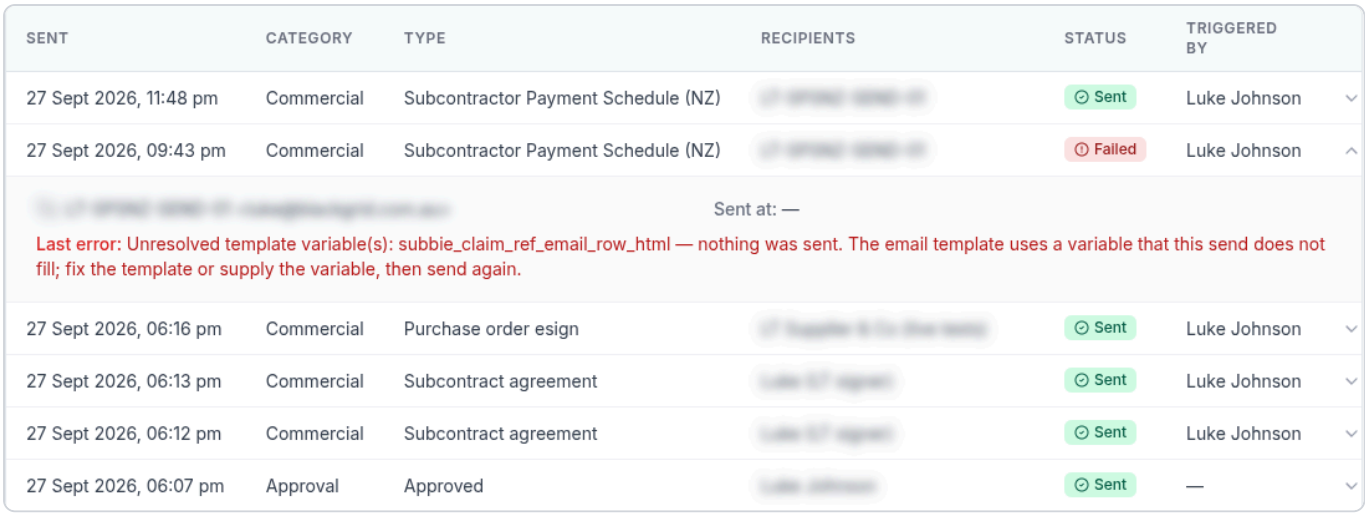


Figure 6. A failed payment schedule email opened in the Notification Log, showing the reason; recipients blurred.

Statuses: **Pending** and **Processing** (queued), **Sent**, **Failed** (with the reason) and **Cancelled**.

11. Troubleshooting

Symptom	Cause and fix
Wrong email template offered	The email's type differs from the document's. Check the type against §12.
No email template offered in step 2	None of that type is Active (tick *Show inactive templates* to find it), or it is under another category. Opening Admin → Document Templates recreates a missing standard email.
Amber notice at step 3, Send disabled	The email uses a variable nothing fills for this record. See §9.
"Failed" in the Notification Log	Open the row and read *Last error*. "Unresolved template variable(s)" means the template uses a variable that send does not fill; fix the template and send again. "No email template found" means no Active email exists for the type.
A value is empty in the email	The record has no value for it. Fill it on the record and send again.
My edit to a standard email disappeared	It can't: saving in the library removes the version marker, so updates skip it. Check that you edited the Active copy.
Can't save an edit: Type shows "Select a type"	Known issue (§2). Ask Deep Space support to change the email.
The sign-off reads "Deep Space Sync"	Known issue: `${sender_name}` in document emails is not yet filled with your name. The line after it (your company's legal name) is correct.
Recipient says there's no attachment	Signature requests carry a signing link, not an attachment. Other document emails attach the PDF and include a 7-day download link.

12. Quick reference: email types

Document	Email type (category `commercial`)	Standard subject
HC Progress Claim PDF	`head_contract_claim_pdf`	Progress Claim `${claim_number}` – `${project_name}` | Submitted for Certification
HC Progress Claim (tax-invoice layout)	`head_contract_progress_claim`	Progress Claim `${claim_number}` – `${project_name}`
HC Payment Schedule (AU)	`head_contract_payment_schedule_pdf`	Payment Schedule `${payment_schedule_id}` – `${project_name}`
HC Payment Schedule (NZ)	`head_contract_payment_schedule_pdf_nz`	Payment Schedule `${payment_schedule_number}` – `${project_name}`
HC Tax Invoice	`head_contract_tax_invoice`	Tax Invoice `${invoice_number}` – `${project_name}`
HC Variation Order	`head_contract_variation`	Variation Order `${variation_number}` – `${project_name}`
SC Progress Claim	`subcontract_claim_pdf`	Progress Claim `${claim_number}` received – `${project_name}`
SC Payment Schedule (AU / NZ)	`subcontract_payment_schedule_pdf` / `_nz`	Payment Schedule `${payment_schedule_id}` – `${project_name}`
Subcontractor RCTI	`subcontract_rcti`	Payment Schedule `${payment_schedule_id}` – `${project_name}` | RCTI Issued
Subcontractor BCTI	`subcontract_bcti`	Payment Schedule `${payment_schedule_id}` – `${project_name}` | BCTI Issued
Subcontract Variation	`subcontract_variation`	Subcontract Variation `${variation_number}` – `${project_name}`
Subcontract Agreement (signature)	`subcontract_agreement`	Subcontract Agreement `${subcontract_sc_number}` – `${subcontract_project}` | Action Required: Signature
Executed agreement (resend)	`subcontract_agreement_executed`	Executed Subcontract Agreement `${subcontract_sc_number}` – `${subcontract_project}`
Purchase Order	`purchase_order`	Purchase Order `${purchase_order_po_number}` - `${purchase_order_status}`
Purchase Order e-signature	`purchase_order_esign`	Purchase Order `${purchase_order_po_number}` – `${purchase_order_project}` | Action Required: Signature

Related guides: *Document Templates: Create, Generate, Download and Send · Out-of-the-box Document Templates · Document Template Variable Dictionary*.