

EMAIL TEMPLATES

Email Templates may be created for emailing reports to your Parent/Guardians.

The templates can be created and updated via your setup.

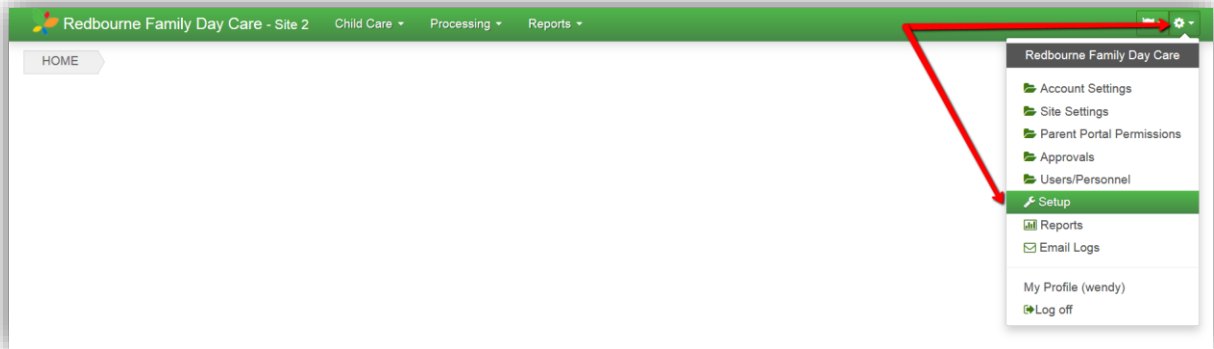
Summary

1. Click on the settings cog
2. Select Setup
3. Select email templates
4. Click on create email template
 - a. Enter name
 - b. Select template
 - c. Enter subject
 - d. Enter body
5. Click save

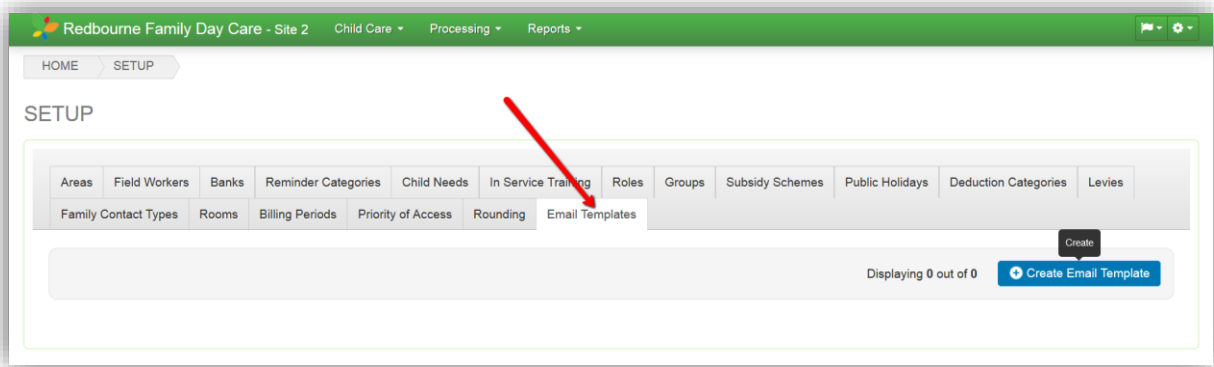
EMAIL TEMPLATES

Detailed

The templates are located in Settings and Setup.



You will need to navigate to the Email Templates tab.



If you would like to create a new template, click **Create New Template**.
You will then need to enter the following details:

Name – Give the template a name that you may identify it by.

Template – Select which report the template is for (Fee Estimate or Statement of Entitlement).

Subject – The subject of the email.

Body – The email message to be sent.

Helpful Hint:

The buttons underneath the body of the email may be used to prepopulate details.

E.G. The 'Guardian Name' button will insert the name of the guardian you are emailing. This will appear in the body of the email as {{GuardianName}}.

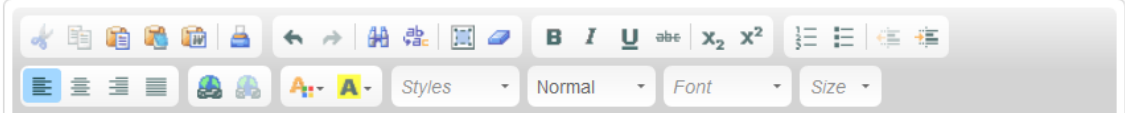
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Email Template Details

Name: Template:

Subject:

Body



Hi {{GuardianName}},

Please find attached a fee estimate.

Kind regards,

{{SiteName}}

body p

When you have finished, click the 'Save' button.

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Troubleshooting

Issue: I cannot select a template when I'm trying to email a parent.

Why? Templates are created only for specific reports and not from a general email you are sending to your parents.

Issue: I've emailed out the report and changed the message however, this didn't update my template.

Why? While you can change the wording per email you send out this will not update the template itself. If you need to change the wording on a template, follow the below process:

- Click on the settings cog
- Select set up
- Click on the email templates tab
- Find the template
- Click on the edit button
- Make the changes needed
- Click save

