Creating/Editing Email Templates

Last Modified on 06/28/2022 11:11 am EDT

Email templates are messages that are created by administrators and have the ability to be sent from the Connect > Communication screen.

1. Click Setup, then select System Config
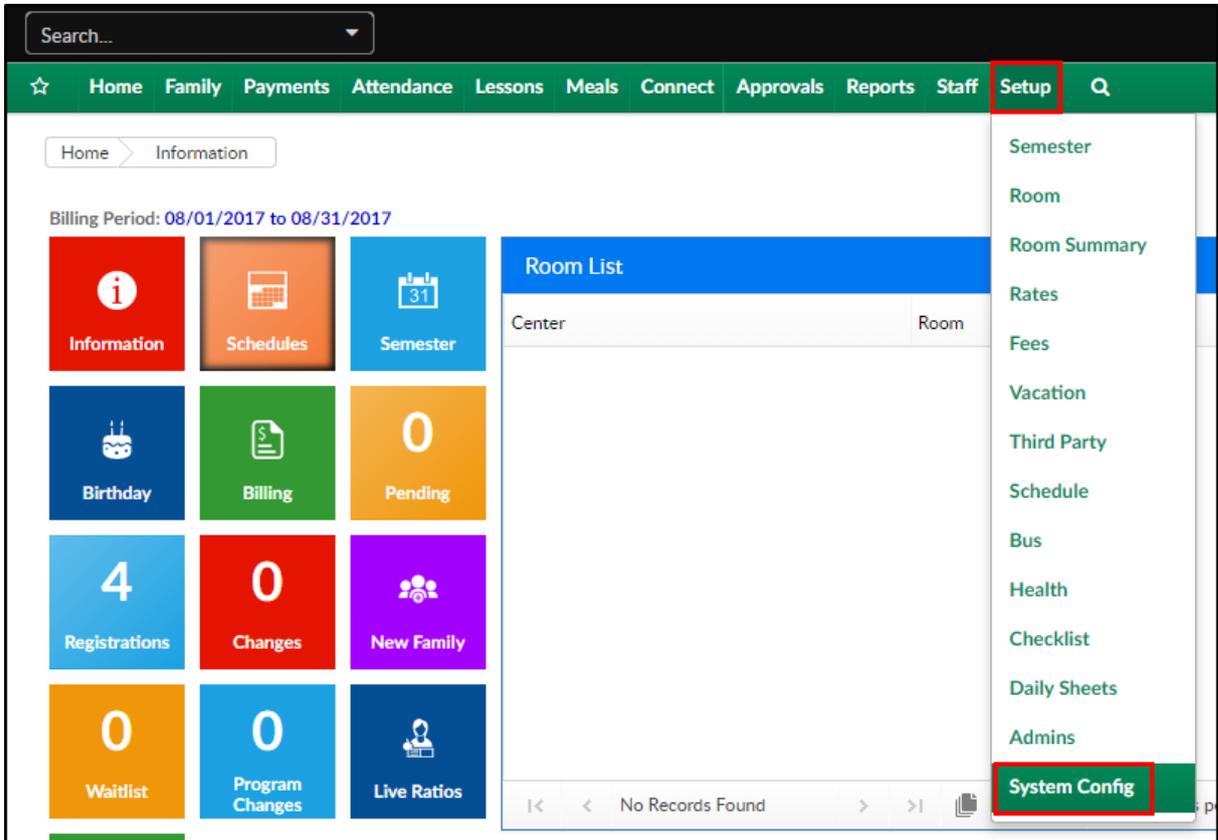
2. Click the Email tile
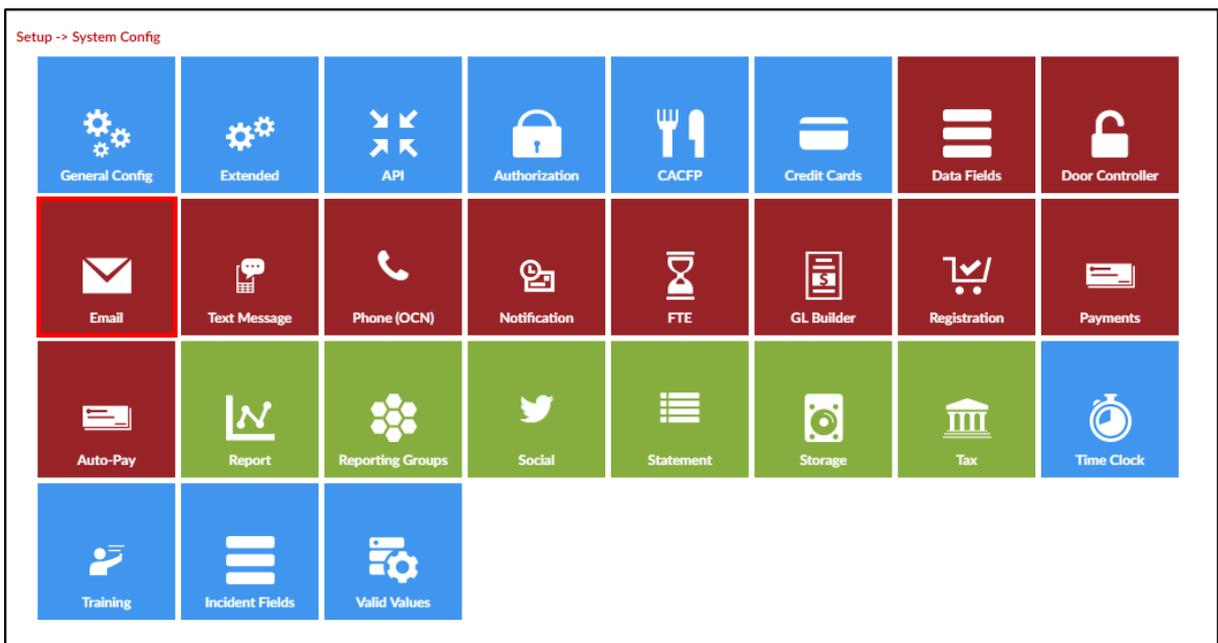
3. Click Custom Email Template Types to create a new template or select an existing template

to update from the drop-down menu (see available template types below)

4. Complete the Setup Custom Email Template Types section
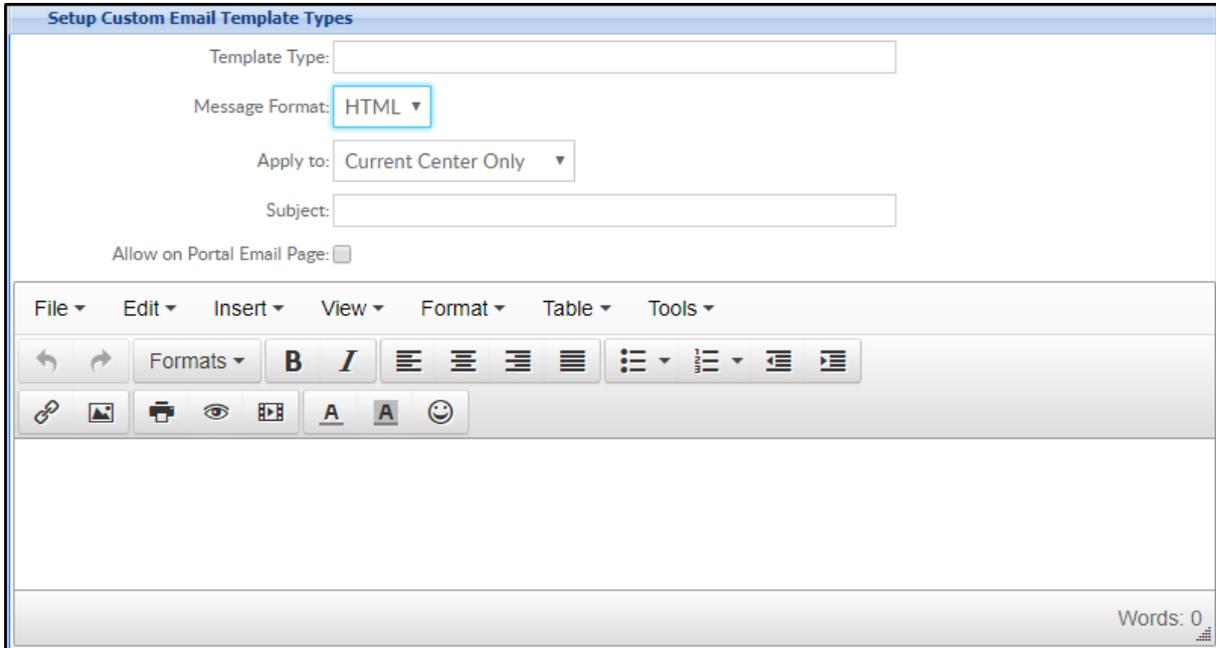
- Template Type - enter a name for the template
- Message Format - HTML (recommended)
- Apply to - choose a center from the drop-down or select All Centers
- Subject - enter the subject that should display to parents
- Allow on Portal Email Page - always select this option so the template can be sent from Connect>Communication
- Enter the message. To view sample email templates, click here
  - Use the shortcuts on the right in the Shortcut Key section to customize the template

Shortcut Keys
@CompanyName
@FamilyName
@FamilyID
@CenterName
@CenterAddress1
@CenterAddress2
@CenterCity
@CenterState
@CenterZip
@CenterPhone
@CenterContactName
@CenterContactEmail
@CenterEmail
@CenterArCollectorEmail
@CenterArSpecialistEmail
@CenterArInboxEmail
@CenterDirectorName
@CompanyID
@AccountID
@ParentFullName
@ParentEmail
@ParentPhone
@PortalURL
@Username
@ParentPinNumber
@ChildrenNames
@ChildrenSchedules

5. Click Save

Template Types Currently Available

Below is a list of template types currently available in the system.

- Auto Pay Approval
- Auto Pay Rejection
- Child Note
- Family Statement
- Family Statement Reminder
- InSite Parent Welcome
- Late Pickup
- Missing Child Procedure
- Outstanding Balance - Fee Added
- Parent Portal - New Account
- Payment Failure
- Payment Return Notification (NSF)
- Payment Success
- Portal Registration Confirmation - Parent
- Registration Approval
- Registration Approval - Admin
- Registration Confirmation - Admin
- Registration Confirmation - Parent
- Registration Rejection
- Room Capacity Reached
- Schedule Change Request Approval

- Schedule Change Request Rejection
- Suspension Warning
- Unscheduled Attendance Fee
- Vacation Days Approved - Parent
- Vacation Days Rejected - Parent
- Waiting List Admin PRA Save
- Waiting List Approval
- Waiting List Entry
- Waiting List Rejection