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

| S | Search | | | | | | | | | | | |
|---|----------------|-----------|--------------------|--------------|-----------|-------|--------------|-----------|---------|---------|---------|-----------------|
| ☆ | Home | Family | Payments | Attendance | Lessons | Meals | Connect | Approvals | Reports | Staff | Setup | ۹ |
| | Home | Informati | on | | | | | | | | Semes | ter |
| E | Billing Period | : 08/01/2 | 2017 to 08/31 | /2017 | | | | | | | Room | |
| | | | | Ro | Room List | | | | Room | Summary | | |
| | 1 | | | 31 | Cente | er | | | F | Room | Rates | |
| | Informatio | | Schedules | Semester | | | | | | | Fees | |
| | <u></u> | | ⊡ 1 | 0 | | | | | | | Third I | Party |
| | Birthday | | Billing | Pending | | | | | | | Sched | ule |
| | | | | | | | | | | | Bus | |
| | 4 | | 0 | : \$2 | | | | | | | Health | |
| | Registratio | ns | Changes | New Family | | | | | | | Check | list |
| | • | | • | | | | | | | | Daily 9 | Sheets |
| | 0 | | 0 | | | | | | | | Admin | s |
| | Waitlist | | Program Changes | Live Ratios | I< | < N | lo Records F | ound | > > | | Systen | n Config i P |

2. Click the Email tile

| Setup -> System Config | | | | | | | |
|------------------------|-----------------------|------------------|--------------------|-----------|--------------|-----------------|------------|
| General Config | ☆☆ Extended | M M API | r Authorization | | Credit Cards | Data Fields | Controller |
| Email | Text Message | Phone (OCN) | Notification | FTE | GL Builder | Registration | Payments |
| Auto-Pay | Report | Reporting Groups | y Social | Statement | Storage | <u>m</u> Tax | Time Clock |
| P Training | Incident Fields | Valid Values | | | | | |

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)

| Custom Email Template Types |
|-----------------------------|
| Setup Email Templates |
| Template Type: |

4. Complete the Setup Custom Email Template Types section

| Setup Custom Email Template Types | | | | | | |
|---|---------------|--|--|--|--|--|
| Template Type: | | | | | | |
| Message Format: HTML 🔻 |] | | | | | |
| Apply to: Current | Center Only 🔻 | | | | | |
| Subject: | | | | | | |
| Allow on Portal Email Page: | | | | | | |
| File Edit Insert View Format Table Tools | | | | | | |
| ◆ Formats • B I E E E E E E E E E E E | | | | | | |
| 8 I T T I A A C | | | | | | |
| | | | | | | |
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| | | | | | | |
| | Words: 0 | | | | | |

- 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



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