Create Custom Email Templates



This guide provides a simple process for creating custom email templates, helping you improve communication, ensure consistency, and streamline your workflow.



2 Select "System".



Select "Custom Emails".

System Settings General, Printing, etc.			
User Logins Jsername, Password, etc.	User Roles Administrator, Technician, etc.	User Groups Administrators, Technicians, etc.	Email Groups Student Changes, Asset Changes, etc.
School Years Start Date, End Date, etc.	SMTP Configurations Gmail, Office 365, etc.	Rules System events and rules for tasks, email, etc	Custom Emails Customize your emails
Custom Fields Create and Manage Custom Fields			

4 Use the "Edit" button to edit an existing email template.

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Sites >	Custom Email(s)	Showing all 1 records			Columns	▼ My Views	+ Add New
Assets >						2 Refresh Pa	ge Size 50 🗸
Students >	View Applied: Standard						
💄 Staff >	Name 🔶	Description	÷	Subject ÷	Body	÷	Actions
fit Locations >	Select	Select		Select	Select		× Clear
🔎 Help Desk >	Waiting on Parts	Waiting on Parts		Waiting on Parts	Waiting on Parts		Edit
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5 Select the "Add New" button to create a new email template.

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6 Enter the "Name" of your new template.

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Sites >	Add Custom Email	Save
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Enter the "Subject" for the email.

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Staff >	Description	
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Help Desk >		
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8 Enter a "Description" of the email template.



Type in the "Body" of your email.

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Select the "Save" button.

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11 The email template is now available to be used on Rules and other functions in the software.

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