## Template Configuration Introduction

## 💾 Fri, May 3, 2024 🛛 🖿 System, Template Configuration

Different emails and SMS messages are used throughout the system and provide information to a variety of Users. If, however, the details in these emails is not quite correct or needs modifying then this can be done using the Template Configuration menu.

From the Template Configuration menu, there are three main areas that house the different the emails/SMS':

- Email Contains all emails used in the system
- Email XML Contains all emails that are sent with an XML attachment
- SMS Contains all areas where an SMS message is sent

To configure a template, Ostara uses it's own HTML Editor.

Using the Core Data > System > Template Configuration Menu, choose the language you wish to edit templates for:



This will open the Template Configuration screen:



Select the Template you wish to update, and click the Edit button in the top right of this window:

| Template Configuration                    | Add | ł      | Email Template Details | E   | dit |
|---|-----|--------|------------------------|---|-----|
| Approver Catalogue Notification           | '   | ^      | Name                   | Reactive  |     |
| Audit                                     |     |        | Summary                | Subject: ~80~ ~5~ ~2~ Work Order ~3~ Attendance: ~20~ - ~6~<br>Receiver can reply?: Yes |     |
| Authorisation Required  Purchasing  Quote |     |        |                        |   |     |
| Authorised                                |     |        |                        |   |     |
| ····                                      |     |        |                        |   |     |
|   |     |        |                        |   |     |
| Completed Denominated Email Chase         |     | v<br>» |                        |   |     |
| L ITAL                                    |     |        |                        | Save  |     |

The Edit Email Template Dialog box will appear. From here you can edit the Subject of the email - and to add placeholders in the subject refer to the "Subject Fields" section. By adding the relevant number inbetween two ~ symbols, the subject will dynamically update with the relevant field. For example, entering ~3~ in the Subject line will insert the Work Order Number into the Subject when the email is sent.

| Edit Email Template |   |    |  |
|---------------------|---|----|--|
| Subject             | ~80~ ~5~ ~2~ Work Order ~3~ Attendance: ~2  | 0~ |  |
| Receiver can reply? | V   |    |  |
| Subject Fields      | Work Order, Work Description = 11<br>Work Order, Work Order Number = 3<br>Work Order, Work Order Priority = 118 | ^  |  |
|                     | Work Order, Work Order Type = 10<br>Work Order Event Event Notes = 137  | ×  |  |
| Email Template      | Dear Sir/Madam of<br>«Contractor Name»,   | ^  |  |
|                     | This is an automated e-mail sent<br>on behalf of<br>«Management Company».<br>«Reply Instructions».              |    |  |
|                     | «Management Company»<br>requires you to carry out the<br>following works. please see below                      |    |  |
|                     | Edit Email Template   |    |  |
|                     |   |    |  |
|                     | OK Canc   | el |  |

To edit the body of the email, click the "Edit Email Template..." button. This will bring up the main Email editor screen:

| File File  | e Home Insert Data   |           |
|------------|--|-----------|
| Paste X    | Arial $\cdot$ Small $\cdot$<br>B / $\square$ $A$ $\times$ $\times^{2}$ $\square$ $\cdot$ $A$ $\cdot$ |           |
| Clipboard  | Font   | Paragraph |
| Dear Sir/N | ladam of «Contractor Name»,  |           |

^

This is an automated e-mail sent on behalf of «Management Company».«Reply Instructions».

«Management Company» requires you to carry out the following works, please see below details of requirement, timescales for attendance and building for the works scheduled to take place:

| Work Order Details            |   |
|-------------------------------|---|
| Work Order Number:            | «Type Of Work Order» «Work Order Number»          |
| Building Number:              | «Building Number»                                 |
| Building Name:                | «Building Name» («Client Name») «Building Suffix» |
| Building Address:             | «Building Address»                                |
| Raised By:                    | «Caller»  |
| Work Area:                    | «Work Order Type»                                 |
| Work Description:             | «Work Description»                                |
| Symptom:                      | «Reported Fault»                                  |
| Code/Quantity:                | «Code Quantity»                                   |
| Reason Code:                  | «Reason For Fault»                                |
| Asset(s):                     | «Asset»   |
| Location:                     | «Location»  |
| Notes:                        | «Notes»   |
| RFI:                          | «Rfi Answers»                                     |
| Attendance Details            |   |
| Assigned date/time:           | «Today (with time)»                               |
| Accept Works and Confirm ETA: | By Contacting the Helpdesk or Updating the Portal |
| Edit Email Template           | CAPS N  |

From here, you can edit the text and layout of the email. If you want to edit the tables in the email, some knowledge of HTML may be required, but changing wording and adding text before and after tables is possible in this view.

If you want to add placeholders from fields in the system, right click on the email at the position you'd like to add the placeholder and under "Custom Fields" choose the relevant field. This will be input in double angle brackets as can be seen above.

| 5  | Undo  |               |                  |                    |                    |                    |                   |
|--|---|---------------|------------------|--------------------|--------------------|--------------------|-------------------|
| G  | <u>R</u> edo                                |               |                  |                    |                    |                    |                   |
| ×  | Cut   |               |                  |                    |                    |                    |                   |
| Г <sub>П</sub>   | Of Work Order» «Work Order Number»          |               |                  |                    | •                  |                    |                   |
| វិភ  | ng Number»                                  |               |                  |                    |                    |                    |                   |
|  | Delete ng Name» («Client Name») «Building S |               |                  |                    | uffix»             |                    |                   |
| 1  |   |               |                  |                    |                    |                    |                   |
| -  | alsed By:                                   |               | Common           | E                  |                    |                    |                   |
|  | alsou by.                                   | «Ouno         | Data             |                    | Building           | •                  | Asbestos Present  |
|  | ork Area.                                   | «vvork        | Order Type»      |                    | Client             | •                  | Availability      |
| (De  | scription:                                  | «Work         | Description»     |                    | Contact            | •                  | Building Address  |
| Symptom: «Reported   |   | orted Fault»  |                  | Management Company | •                  | Building Contacts  |                   |
| ode/Quantity: «Code Quant                                    |   | Quantity»     |                  | Misc               | •                  | Building Telephone |                   |
| eason Code: «Reason For Fault                                |   | on For Fault» |                  | Resource           | •                  | Conservation Area  |                   |
| Asset(s): «Asset»  |   | t»            |                  | URL                | •                  | Hazard Notes       |                   |
| Location: «Locatior  |   | tion»         |                  | Work Order         | •                  | Height Restriction |                   |
| Notes: «Notes»   |   | 1             | Work Order Event | •                  | Listed Building    |                    |                   |
| RFI: «Rfi Answers»   |   |               |                  |                    |                    |                    | Name              |
|  |   |               |                  |                    |                    |                    | Noise Abatement   |
|  |   |               |                  |                    |                    |                    | Notes             |
| ed date/time: «Today (with time)»                            |   |               |                  |                    |                    |                    | Number            |
| Confirm ETA: By Contacting the Helpdesk or Updating the Port |   |               |                  |                    |                    | orta               | Suffix            |
|  |   |               |                  |                    | Weight Restriction |                    |                   |
|  |   |               |                  |                    |                    |                    | Width Restriction |

Once all the necessary changes have been made, close the Email editor window, ensuring you click all prompts to save the updates, then click OK, and Save to commit the changes to the template. All changes will be effective immediately.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=14