

How to create an email template

Wednesday, March 04, 2009
11:16 AM

Khafre
File and Document Management System

Master Branch Trainer - Training Branch - Master Branch Administrator

Branch Adminis

Email Templates

No Match

Step 1: Click Branch Admin

Step 2: Click Email Templates

Step 3: Click New Template

Step 4: Click View Tags

Step 5: Create a Description, Subject and who would generally receive this email.

Step 6: Type body of email inserting the tag where needed See Example

Step 7: Click Create

Dynamic Email Tags

Choose File: Joe Homeowner 123454 Town County

\$AgentFirstName	Agent
\$AgentLastName	Trainer
\$AgentName	Agent Trainer
\$AgentEmail	no_reply@paymentgone.com
\$AgentAddress	Here
\$AgentAddress2	
\$AgentCity	Long Beach
\$AgentState	CA
\$AgentZip	90909
\$AgentAddress1Ln	Here, Long Beach, CA 90909
\$AgentAddressML	Here Long Beach, CA 90909
\$AgentHomePhone	
\$AgentWorkPhone	
\$AgentWorkPhoneExt	
\$AgentCellPhone	
\$AgentFax	
\$ProcessorFirstName	
\$ProcessorLastName	
\$ProcessorName	
\$ProcessorEmail	

Quick Note: Scroll down to see all of the possible email tags.

Quick Note: If you choose a file from your branch it will display a sample of what each "tag" will generate on the email.

Dear \$AgentFirstName

Welcome to our system we have your address as \$AgentAddressML

Please let us know if this is correct.

Thank you