Notification Templates – Email/SMS

Overview

Notification Templates can be created for all the email and text notifications The Edge can send out. This allows you to design and customize both the look and content of these messages. Templates can be specified for each notification type.

Additionally, you can create **Timed Rules** so that notifications can be scheduled. You can, for example, create a reminder notification that automatically goes out after a job is 7 days overdue for pick up. See the **Automated Notifications** document and video for more information on setting these up.

Templates can be designed for customer facing notifications and associate facing notifications. The following are available.

<u>Customers</u>
- ➢ **Repair**
- ➢ **Custom Job**
- ➢ **Appraisal**
- ➢ **Special Order**
- ➢ **Wishlist**
- ➢ **Appointment**
- ➢ **Anniversary**
- ➢ **Birthday**
- ➢ **Layaway Inactivity**
- ➢ **Rewards**
- ➢ **Quote**

<u>Associates</u>
- ➢ **Appointment**
- ➢ **Blind Counts**
- ➢ **Note Added**
- ➢ **Task Added**
- ➢ **Opportunity Updated**
- ➢ **Report**

NOTE The software includes default templates for each notification type. If no template is specified, these will be used.
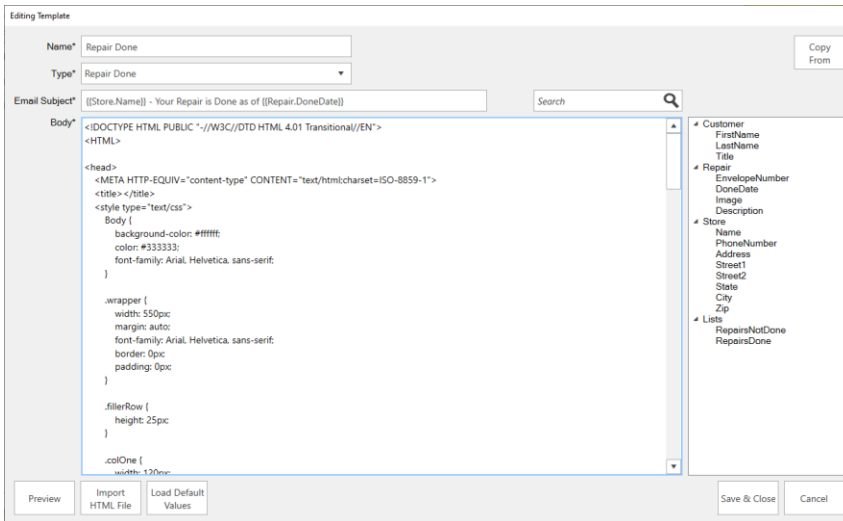
Email

Email templates are created in HTML code and can include data merge fields that pull in data values from the software. That means you must provide the software with raw HTML code that will be used to render your emails when sent. Understandably, this can sound like a daunting task. Fortunately, there are tools to make this a lot easier than it sounds.

Editing a Default Template

The easiest place to start is customizing our existing default templates. For this example, we will be creating a new default **Repair Done** template that is based upon the built-in template we provide.

To do so:

1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add New Email** button at the bottom.

2. Enter **Repair Done New Default** as the **Name** and select **Repair Done** from the **Type** drop-down.

3. Next, click the **Load Default Values** button at the bottom. This will fill in the **Email Subject** and **Body** with the software's default values.

4. To see how this email will look rendered, click the **Preview** button at the bottom. The preview will render using the most recent notification data sent, so in this case the last repair done email that got sent to a customer.
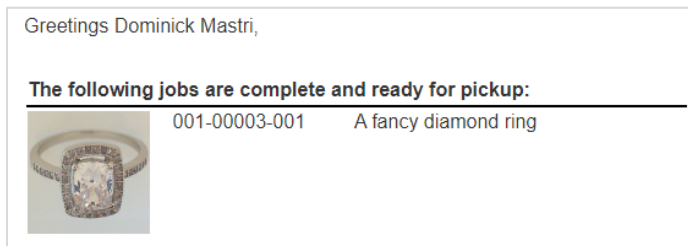
5. Now, let's customize this by changing the greeting, adding the done date to the repairs, and putting the store's information at the end. Close the **Preview** that you opened in the last step and click inside the HTML code in the body.

6. Scroll down until you find the section that says "Greetings {{Customer.FirstName}} {{Customer.LastName}}". Notice the text in purple; purple text indicates this is a data merge field that is a placeholder for data that will come from the repair. Available fields appear on the right.
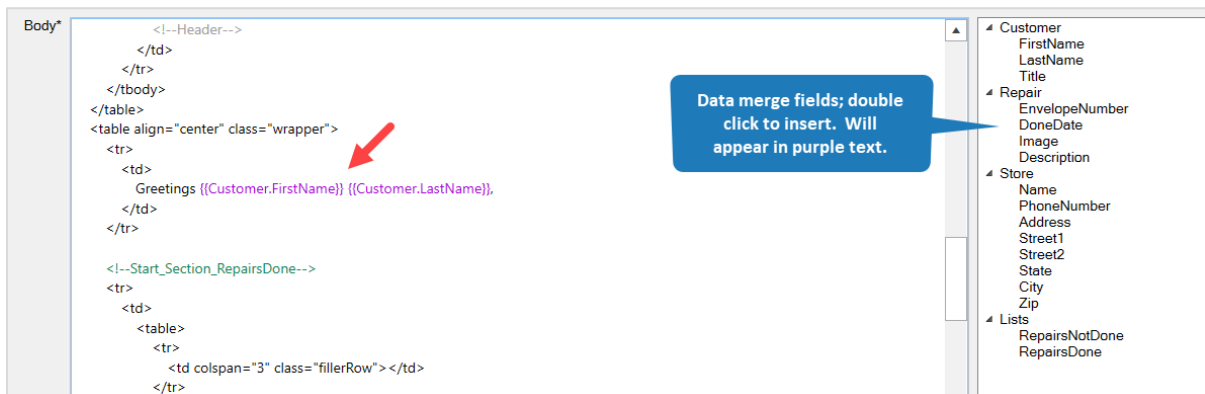
7. Click inside the HTML and change "Greetings {{Customer.FirstName}} {{Customer.LastName}}," to "Hello {{Customer.FirstName}},".

```
<table align="center" class="wrapper">
    <tr>
        <td>
            Hello {{Customer.FirstName}},
        </td>
    </tr>
```

8. Scroll down and find the <!- -Start_Section_RepairsDone - -> text in green. Green indicates this is an internal comment that will be ignored when this email is rendered. These internal comments always appear between <!- - and - ->.

```
Body*    <!--Start_Section_RepairsDone-->
         <tr>
            <td>
               <table>
                  <tr>
                     <td colspan="3" class="fillerRow"></td>
                  </tr>


                  <tr>
                     <td colspan="3">
                        <p class="headerText">The following jobs are complete and ready for pickup:</p>
                     </td>
                  </tr>
                  <!--Start_List_RepairsDone-->
                  <tr>
                     <td colspan="3" class="middleLineSmall"></td>
                  </tr>
                  <tr>
                     <td class="colOne">
                        <img src="{{Repair.Image}}" width="100" height="100" border="0" alt="Image" />
                     </td>
                     <td valign="top" class="colTwo">{{Repair.EnvelopeNumber}}</td>
                     <td valign="top" class="colThree">{{Repair.Description}}</td>
                  </tr>
                  <tr>
                     <td colspan="3" class="fillerRow"></td>
                  </tr>
                  <!--End_List_RepairsDone-->
               </table>
            </td>
         </tr>
         <!--End_Section_RepairsDone-->
         <!--Start_Section_RepairsNotDone-->
         <tr>
            <td>
               <table>
```

9. Click after {{Repair.EnvelopeNumber}} and type in "
Done:", then on the right double click **DoneDate**.
 is HTML code to break to the next line. It should now look like this.

```
<tr>
   <td class="colOne">
      <img src="{{Repair.Image}}" width="100" height="100" border="0" alt="Image" />
   </td>
   <td valign="top" class="colTwo">{{Repair.EnvelopeNumber}}<br />Done: {{Repair.DoneDate}}</td>
   <td valign="top" class="colThree">{{Repair.Description}}</td>
</tr>
```

10. Scroll down and find the text <!- - Footer - -> at the bottom.

```
<table align="center" class="wrapper">
   <tbody>
      <tr>
         <td>
            <!--Footer-->
         </td>
      </tr>
   </tbody>
</table>
</body>
```

11. Completely erase <!- - Footer - -> and in its place type: "If you have any questions please call us here at " and then on the right double click **PhoneNumber** to insert {{Store.PhoneNumber}}, then type in "

Sincerely,

Your Friends at" and on the right double click **Name** under **Store**. It
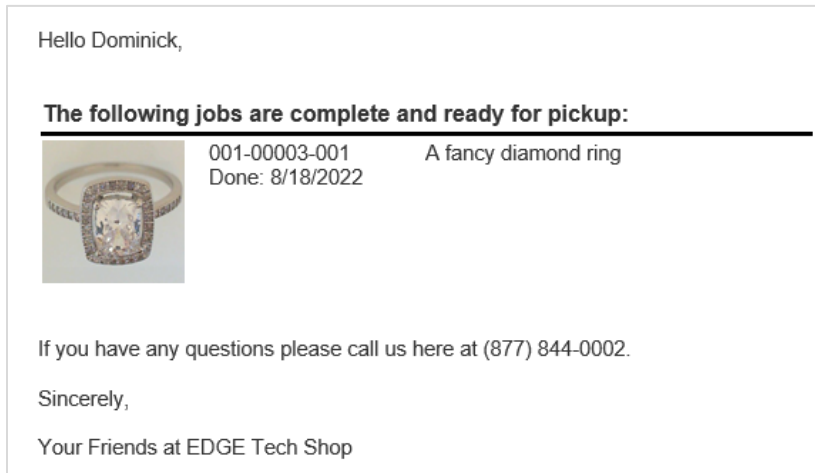
should look like this.

```
<table align="center" class="wrapper">
  <tbody>
    <tr>
      <td>
        If you have any questions please call us here at {{Store.PhoneNumber}}.  <br /><br />Sincerely, <br /><br /> Your Friends at {{Store.Name}}
      </td>
    </tr>
  </tbody>
</table>
```

12. Finally, click **Preview**. A preview will display using the most recent repair done email data. If you compare to the preview from Step 4 you can see the changes we made.

Hello Dominick,

The following jobs are complete and ready for pickup:

001-00003-001   A fancy diamond ring
Done: 8/18/2022

If you have any questions please call us here at (877) 844-0002.

Sincerely,

Your Friends at EDGE Tech Shop

Now that you have created the template, you must instruct the software to use it. See the **Template Administration** section for more information.

Creating a New Template

For advanced users, you can create new email templates from scratch. If you are familiar with HTML, you can code the template directly in the software's editor.

Alternatively, you can create HTML templates using other editors and then copy or import the HTML code over to Edge. Sites such as [Constant Contact](#) and [BeeFree](#) feature editors where you can build a template graphically and then export it as raw HTML.

It is recommended you review our default templates. Specifically, the **Repair**, **Custom Job**, **Appraisal**, and **Special Order** default templates contain example HTML code with sections clearly labeled to show how to display jobs along with their images.

For example, in the **Custom Job** default template you will find this section to display jobs that are done:

```
<!--Start_List_CustomJobsDone-->
<tr>
  <td colspan="3" class="middleLineSmall"></td>
</tr>
<tr>
  <td class="colOne">
    <img src="{{CustomJob.Image}}" width="100" height="100" border="0" alt="Image" />
  </td>
  <td valign="top" class="colTwo">{{CustomJob.EnvelopeNumber}}</td>
  <td valign="top" class="colThree">{{CustomJob.Description}}</td>
</tr>
<tr>
  <td colspan="3" class="fillerRow"></td>
</tr>
<!--End_List_CustomJobsDone-->
```

To import or copy in your own HTML:

1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add Email** button at the bottom.

2. Choose the **Type** of template and type in a **Name** and **Email Subject**.

3. Either paste in your HTML or use the **Import HTML File** button at the bottom and select it.

4. Be sure to use **Preview** to ensure the HTML renders as expected.

5. Finally, click **Save & Close**.

Now that you have created the template, you must instruct the software to use it. See the **Template Administration** section for more information.

SMS (Text Message)

Text message templates are created in plain text and can include data merge fields that pull in data values from the software, such as customer name, job number, and more.

Editing a Default Template

The easiest place to start is customizing our existing default templates. For this example, we will be creating a new default **Repair Done** template that is based upon the built-in template we provide.

To do so:

1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add New SMS** button at the bottom.

2. Enter **Repair Job – Done** as the **Name** and select **Repair (Customer)** from the **Type** drop-down.

3. Next, click the **Load Default Values** button at the bottom. This will fill in the **Body** with the software's default values.

4. Click the **Preview** button to see what this text will look like when sent to the customer.

   ```
   EDGE Tech Shop: Repair 001-00067-001 is done and ready to be picked up.
   ```

5. Now let's customize this by moving the store name to the end and adding a greeting as well as the amount due to the text. Close the **Preview** you opened in the previous step and click inside the **Body**.

6. Erase "{{Store.Name}}:" from the beginning and type in "Hello" then double click **FirstName** from the data merge fields on the right. It should now say "Hello {{Customer.FirstName}} – put a comma after the last bracket. Then press enter twice to move the remaining text down two lines.

7. Position the cursor after the word "up" and press enter to drop to the next line, then type "Balance due:" and double click **AmountDue** on the right.

8. Press enter twice, then type "Your friends at" and select **Name** from the right under **Store.** Your screen show now look like this.

9. Click the **Preview** button at the bottom to see what this text will now look like when sent.

```
Hello Dominick

Repair 001-00067-001 is done and ready to be picked up.
Balance due: $149.00

Your friends at EDGE Tech Shop
```

10. Click **Save & Close**.

Now that you have created the template, you must instruct the software to use it. See the **Template Administration** section for more information.

Creating a New Template

In this example we will create a new **Custom Job Done** template to replace the system default.

To create the template:

1. Click **Administrative > Notifications > Manage Notification Templates**, then click the **Add New SMS** button at the bottom.

2. Enter **Custom Job - Done** as the **Name** and select **Custom Job (Customer)** from the **Type** drop-down.

3. Click inside the **Body** and type: "Hello" then double click **FirstName** from the data merge fields on the right. It should now say "Hello {{Customer.FirstName}}" – put a comma after the last bracket. Note that data merge fields will appear in purple text in the template.

4. Complete the template by typing:
   "Your custom job is ready for pick up!

   Job: {{CustomJob.EnvelopeNumber}}
   Description: {{CustomJob.Description}}
   Balance due: {{CustomJob.AmountDue}}

   Call us if you have any questions at {{Store.PhoneNumber}}

thanks,
{{StoreName}}"
It should look like this.

5. Click the **Preview** button at the bottom to see what this text will look like when sent to a customer.

6. Click **Save & Close**.

Now that you have created the template, you must instruct the software to use it. See the **Template Administration** section for more information.

Template Administration

By default, all **Notification Types** will be set to use the built-in Edge default. You can specify your own custom templates using the **Template Admin** screen. This can be used to specify both custom SMS and email templates.

To access **Template Admin:**

1. Click **Administrative > Notifications > Template Admin**. The **Template Admin** window will appear.

2. Use the drop-down next to each notification type to specify which template to use.

3. After making your changes click **Save**, then **Close**.