EMAIL MODULE TEMPLATES

Learn how to create and edit Email Templates. We'll cover email confirmations/receipts, reminder/follow-up notices, marketing emails, email roster to instructor, and custom merge mail templates. We'll also discuss the pros/cons of sending HTML formatted emails. The basics of template editing will be provided and resources will be identified to help you along the way.

Location of Email Templates

Student Manager Templates are accessed from Module >> Catalog >> Email Templates.

Student Manager Email Templates

These routines in Student Manager use email templates:

- Receipts – option to email receipts from Registration or Payment screens. You can also mass email receipts with a DOEMAIL() option. Both routines use the same templates.

- Merge Mail – templates used for special emails, such as course reminders, instructor contracts, marketing (i.e. upcoming courses), and transcripts/grade reports.

- Send Quick Email to Class – very similar to Merge Mail, though more for course reminders or course info type of emails.

- Course Reminders/Follow-ups – uses the REMINDER or FOLLOWUP template, respectively (you can use others, but these are the default). Reminders are handy to make sure you get butts in seats. Follow-ups are good to get feedback or promote the next course in the series.

- Email Roster to Instructor – uses either the ROS2TCH or ROS2TCHHTM template depending on which format you are sending (chosen when you run the routine).

Adding/Editing Student Manager Templates

Templates consist of 3 parts:

- Header – text at the beginning of your email

- Body – pulls information from the data tables (i.e. registrant, course information, fees, etc.). It will be repeated on emails that have more than one item (i.e. receipts where the student is in multiple courses, transcripts list each and every course, etc.)

- Footer – text at the end of your email

Student Manager Template Editing Rules

Headers/Footers:

- Receipt Templates – headers and footers are simple text.

- Merge Mail Templates and Send Quick Email to Class (e.g. Course Reminders, Instructor Contracts) – you can use fields and report functions in the Headers/Footers. If you do, you must enclose all text items in quotation marks. If you are not using fields or functions, headers/footers are entered in simple text.

- Email Roster to Instructor – the only control you have is the header of this one, so encode it as much as you need to. Course information is available, natively.

Body

As a general rule, this returns data from the database tables/report cursor. Follow expression writing rules when composing your body:

- Text strings MUST be enclosed in quotation marks, e.g. "Registrant: ". Note: HTML is not processed by Student Manager. So you must enclose any HTML in quotes too.

- Concatenation mark are used to join the pieces of your email body together, i.e. you must have a plus sign (+) between each item in your email body, e.g. "Registrant: "+namer(rgid).

  o Note: you can only concatenate strings together. Convert numbers with the TRANSFORM or STR functions (i.e. TRANSFORM(cosess) or STR(cosess,3)), use SHOWTF to show logicals (i.e. SHOWTF(cocancel)), or convert dates with the DTOC (Date TO Character) function (i.e. DTOC(cobegdate)).

  o Note 2: The maximum string length is 255 characters. You must stop each string before it hits that limit and concatenate it with the next one. Really, every 2 or 3 sentences should be their own string, except large sentences should have their own.

- Carriage Returns/Line Breaks – use the crlf to insert a line break, cr2lf to insert 2, e.g. "Registrant: "+namer(rgid)+cr2lf. Note: if using HTML formatting, you must use the "<br>" tag instead of the crlf or cr2lf. E.g. "Registrant: "+namer(rgid)+"<br>"

- Fields – include fields from database tables, e.g. course title, course times, registration fee, etc. What fields are available is determined by the area from which you are running the email.

- Functions – use report functions to format data/include other database fields. IMPORTANT: you must convert the results to character expressions if they aren't already.

- Special Variables – in running merge mails and receipts, there are some variables available for you.
  o edates – displays course dates
  o edue – total due for registration
  o emember – displays Membership type and expiration date
  o epaid – total paid for registration
  o eptype – display payment type (if any)
  o ewkshop – displays workshop code and title for all workshops in which individual is enrolled
  o eoptfees – displays any Additional Charges assessed to registration
  o ebal – balance due for registration
  o erecpaid – date of payment, receipt number and amount
  o epymsg – message stating either 'Thank you for your payment', or 'Balance due X, please make checks payable to institution Y'
  o prettyloc – displays formatted location information

HTML Formatted Emails
Basic HTML Email Rules:
1. Start the header with the opening <html> and close the footer with the closing </html> tag. Then use html coding to format the contents. E.g.
 tags for line breaks, etc.

2. Images and documents (not attachments) must reside in a public folder on your website, e.g. wconnect\ace\images folder.

3. Many email clients don't support all HTML/CSS options. E.g. Outlook 2007/2010 doesn't support the Float property. Gmail doesn't support the <link> or <style> tags. Others do funky things at times.

For more information: http://www.campaignmonitor.com/css/

The main reason to use HTML/CSS is to pretty up emails. If you don't care about pretty, then standard is fine. For marketing emails (and some others), they probably need to be a little nicer. If you don't speak HTML, here are some references/tools:
- w3schools.com – THE reference guide on many programming languages, including HTML and CSS.

- aceware.com/htmlemail.html – A web based WYSIWYG HTML editor. Can also be used on your course descriptions. Can be gotten to from the SM Menu: Help >> Create HTML Formatted Emails.
- Click Preview Email from the Email Template screen to see about how it will render in an email (codes, functions, and variables still will show).