

REPORTING

EDIT A TEMPLATE

The **Email Designer** tool gives users the ability to create email templates and provides a designer for customising the current email templates within BPO2. Users also have the opportunity to test these email templates using BPO2's existing email service.

USER REQUIREMENTS

- A basic working knowledge of word processing software e.g.
 Microsoft Word.
- An *email address*, used for sending out emails.
- An understanding of where the **email flags** occur in BPO.

VERSION COMPATIBILITY

- BPO2 v2.4.0.1 or later.
- BPO Configurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script, necessary to use the new email designer module.

Ribbon Access: Configurator > Reporting > Email Designer





EDIT A TEMPLATE

- The **Edit** button allows users to edit a template for an <u>existing</u> company email flag.
- Select the email template you wish to edit.
- Click on *Edit*.

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- The *Edit Email* screen will open with data for the selected template loaded.
- You can edit the template using the <u>Word Processing Tools</u> or <u>add</u> or <u>delete</u> information .



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SAVE EMAIL TEMPLATE

• When you are done, click on *Save*.

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- A *Process Validation* message will pop up telling you;
 - Saved Successfully.
- Click on Ok.



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• Click on *Back* to return to the *Email Template Listing for Company:* [] screen.

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