

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.

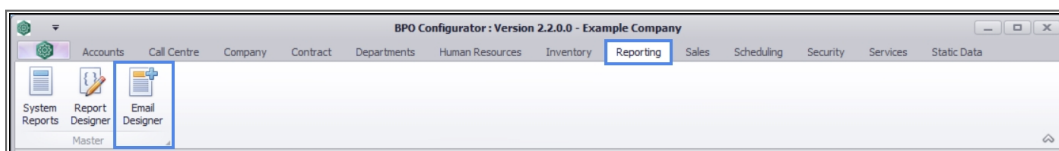
USER REQUIREMENTS

- 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

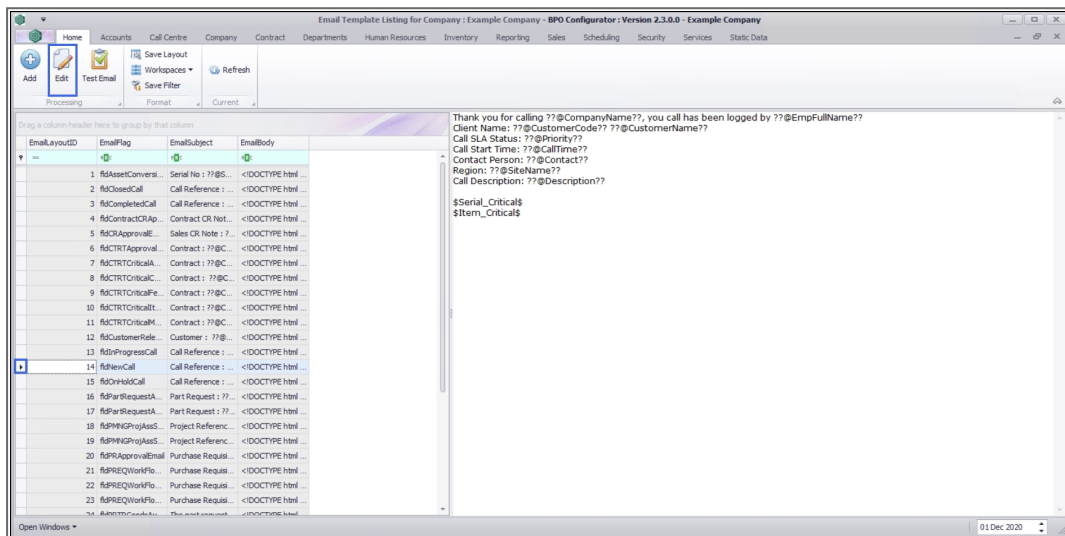
- BPO2 v2.4.0.1 or later.
- BPO Configurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script, necessary to use the new email designer module.

Ribbon Access: *Configurator > Reporting > Email Designer*



EDIT A TEMPLATE

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

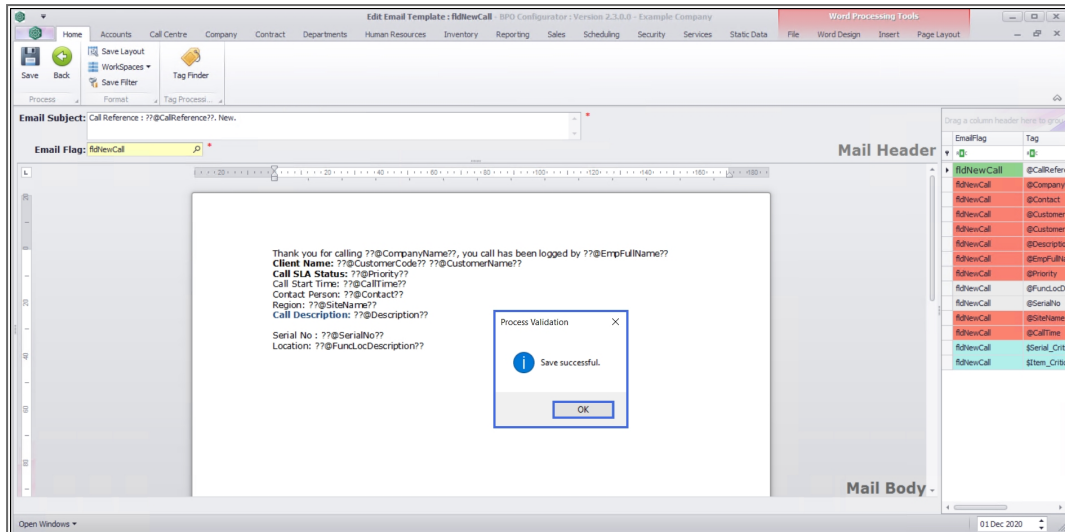


- The **Edit Email** screen will open with data for the selected template loaded.
- You can edit the template using the Word Processing Tools or add or delete information .

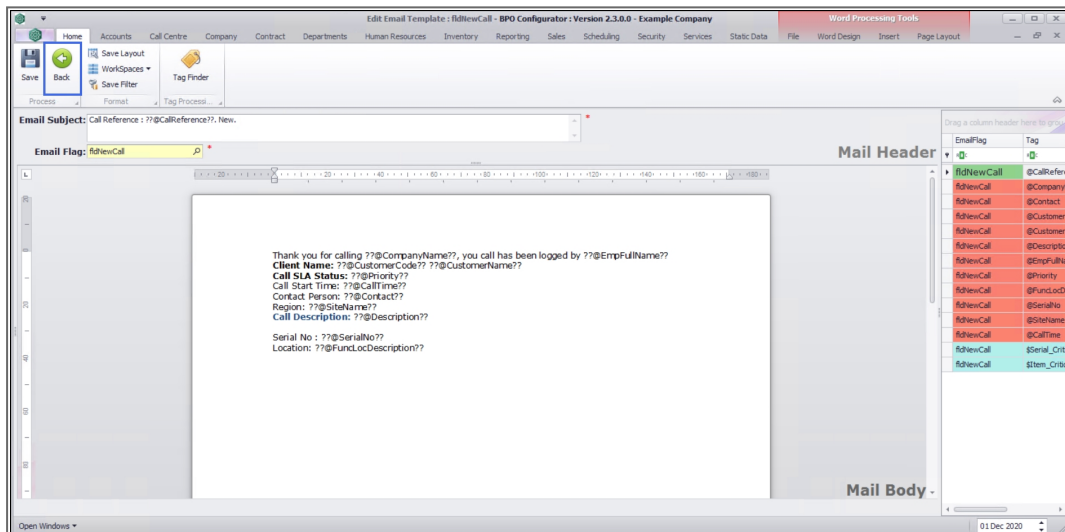


-
- 01 Dec 2020

- CO3 Technologies (Pty) Ltd © Company Confidential



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



MNU.163.003