We are currently updating our site; thank you for your patience.

REPORTING

TEST EMAIL

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

The **Test Email** functionality allows the user to send the email template to an email address. The user will be able to set data for each tag to view how the email will look once it is processed by the emailing service.

USER REQUIREMENTS

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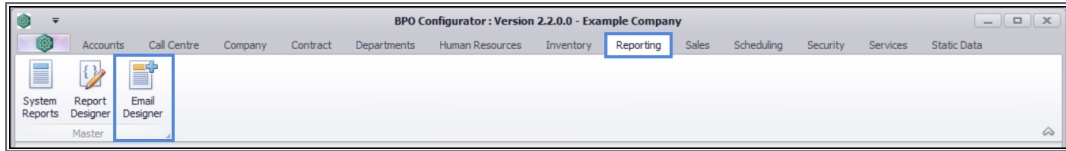- An understanding of where the email flags occur in BPO.

VERSION COMPATIBILITY

- BPO2 v2.4.0.1 or later.
- BPOConfigurator 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
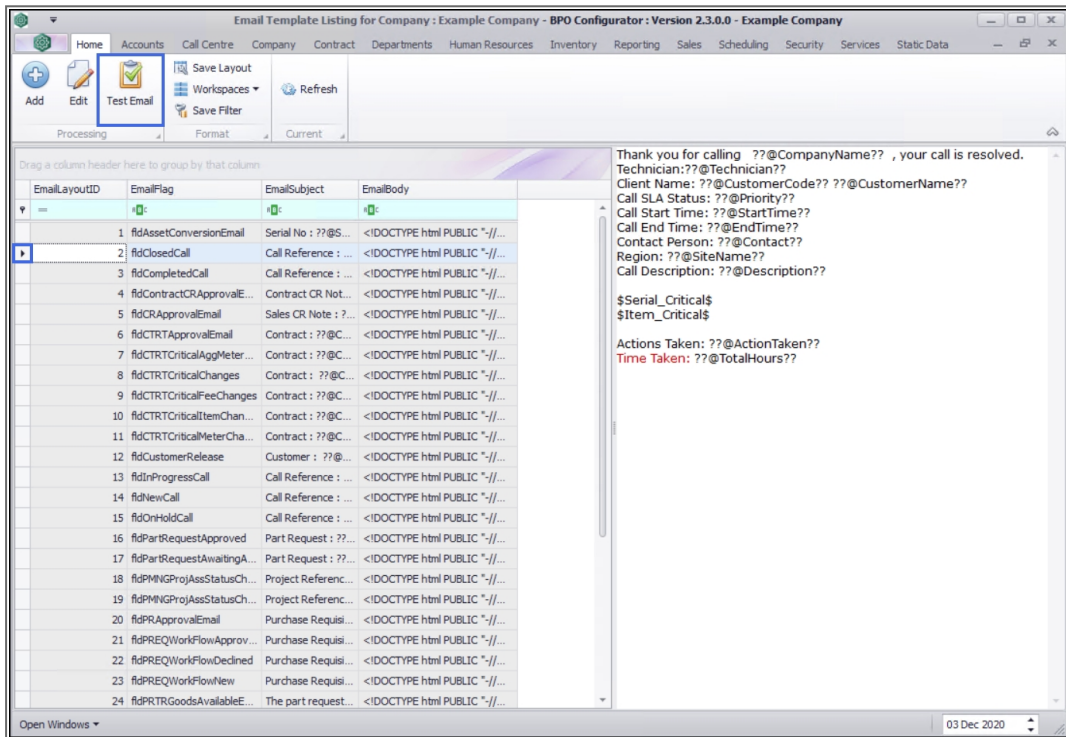
The **Email Template Listing** screen will open.

SELECT EMAIL TEMPLATE

- Select the **email template** you wish to test.
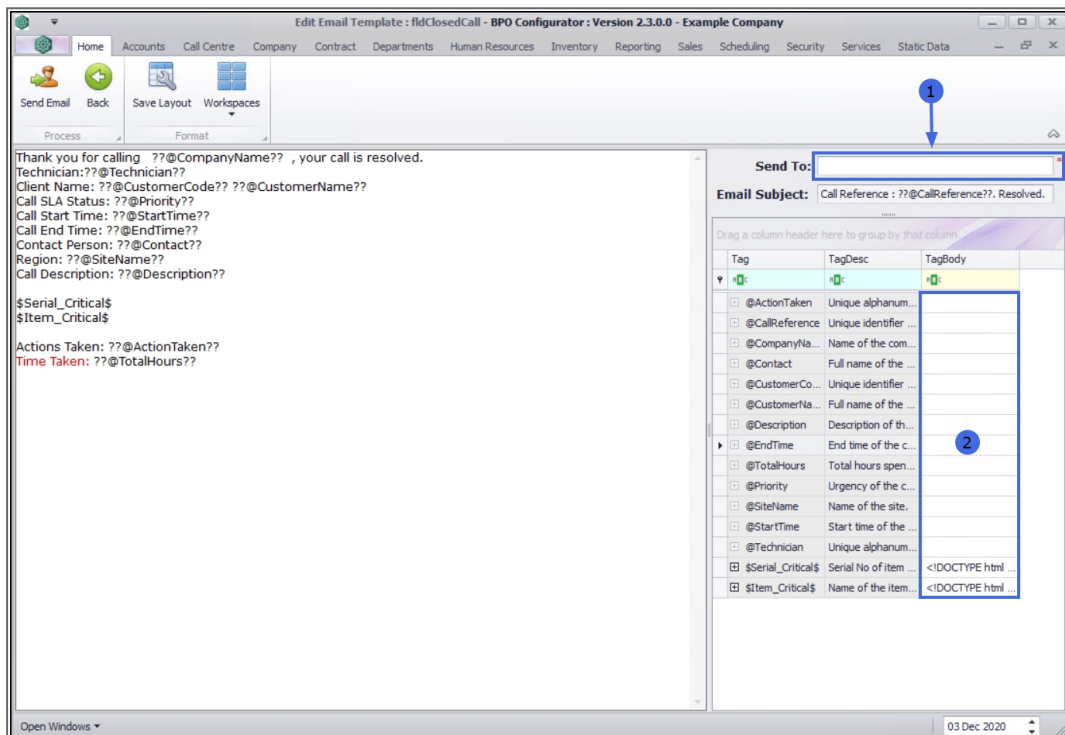- Click on **Test Email**.

The **Edit Email Template** screen will open with the selected template loaded.

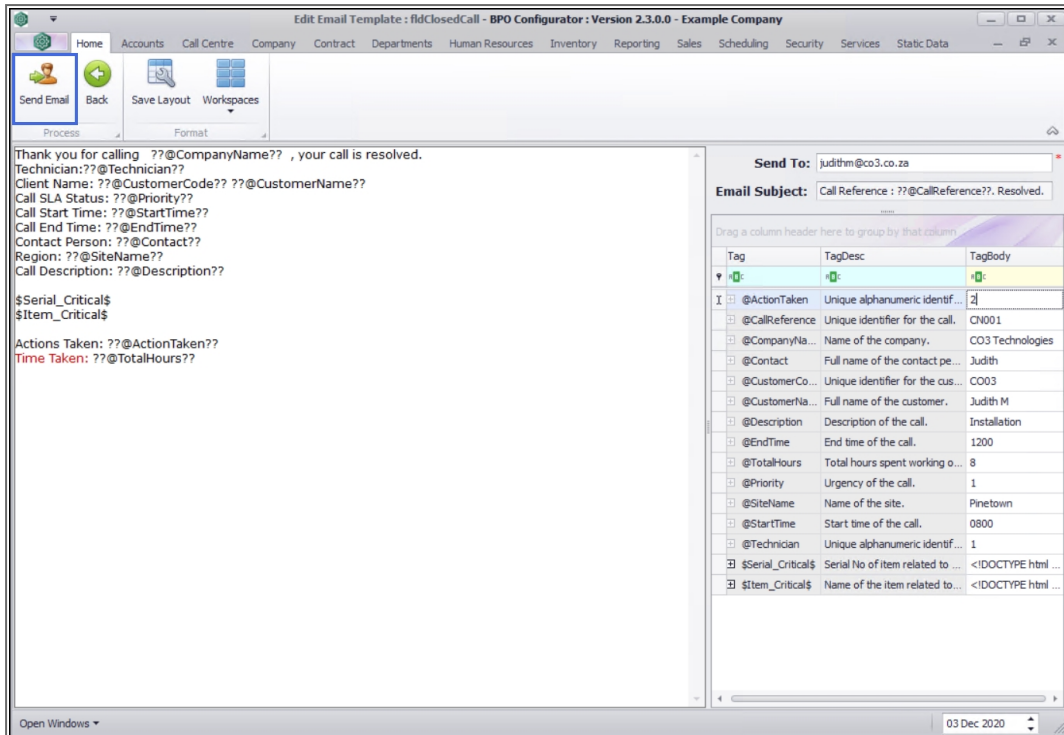Tags that are <u>not</u> present on the email template are filtered out.

ADD TEST EMAIL DETAILS

1. Type in the email address of the recipient in the **Send To:** field.
   - **Note**: You cannot add multiple recipients for the test email.
2. In the **Tag Body** column, type in the test data you wish to use in the email e.g. if you type in **John Leeds** in the tag body for tag **@Contact**, then the test email will display **John Leeds** wherever there is a tag **@Contact** in the email template.
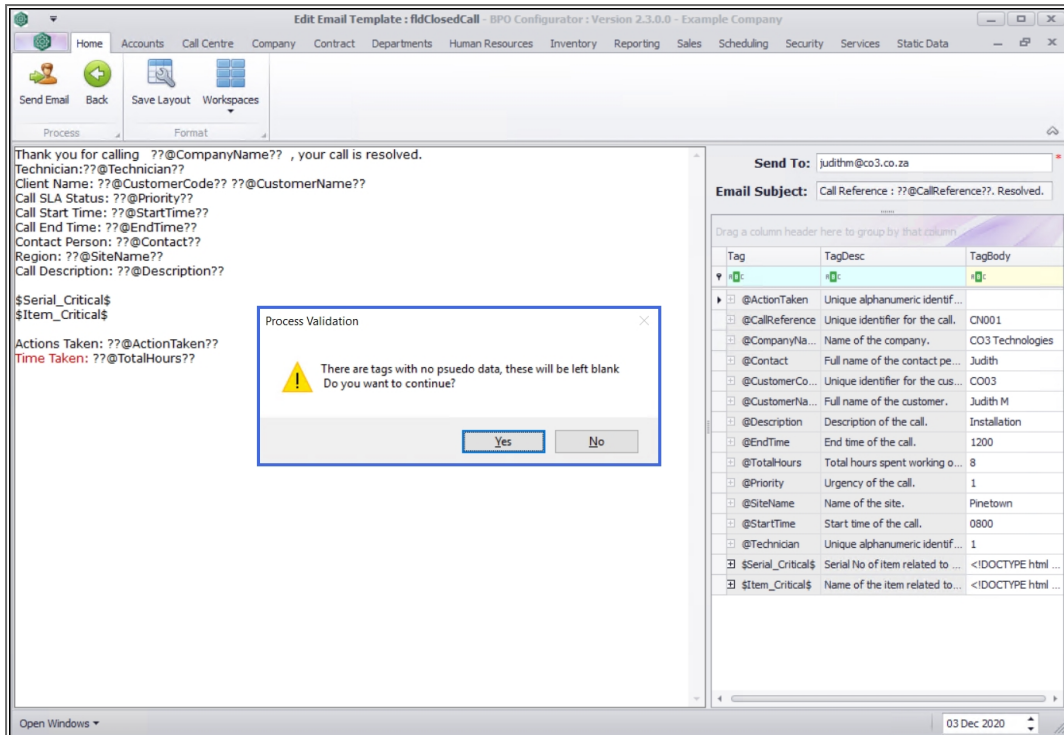

SEND TEST EMAIL

- When you are done, click on **Send Email**.
  - **Note 1**: The email will not send without a **recipient**.
  - **Note 2**: The email will not send if the user does not have an **email address**.

- If you did not fill in all the fields in the **body tag** columns, a **Process Validation** message will pop up telling you;
    - **There are tags with no pseudo data, these will be left blank. Do you want to continue?**
- Click on **Yes** if you wish to continue.
- Click on **No** if you wish to go back and fill in the blank fields. When you have finished populating your required fields, click on **Send Email** again.

- A **Process Validation** will pop up telling you;
  - **Email was saved successfully**.
- Click on **OK**.
  - **Note:** The message '**Email was saved successfully**' means your test email has been <u>sent</u> successfully.

MNU.163.004