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Letter Templates & System Messages

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Introductions

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- Implementation Manager
- 10 years in Student Affairs
- 3+ years with Symplicity

Letter Templates vs System Messages

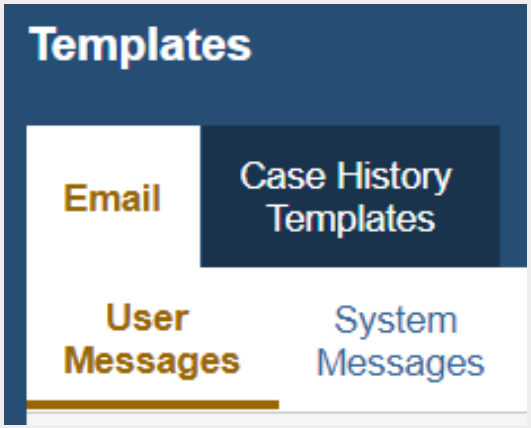
Letter Templates

Letter templates are set up using a combination of text and merge codes and are sent out by a user of the system.

System Messages

System messages are editable messages using a combination of text and merge codes and are sent by the system when triggered by an action. Ex: new incident is submitted.

Left-hand Navigation > Tools > Templates > Emails > User Messages or System Messages



Template for All Letters

1. Letterhead
2. Opening/first few lines
3. Closing
4. Cc's and/or footer

To the system we go…

Things to Remember:

- Copy/Paste Source Code – easily copy/paste your Template for all Letters by copying the sourcecode and pasting into your new letter template.

- Disable System Messages – review all system messages, update the ones you will use, disable ones you will not use.

- Signature Mergecode – configure your mail signature as you would like it to appear.

- Custom Fields & Mergecodes – when you create a custom field on a form, a mergecode is created too. If you have something that you are constantly typing into letters by hand, is there a good place to enter this in the workflow?

Questions?

Thank you!

Contact Information

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