\blacksquare symplicity TM

Letter Templates & System Messages

18 ADVOCATE SYMPOSIUM

Introductions

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



Letter Templates vs System Messages

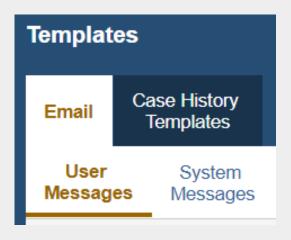
<u>Letter Templates</u>

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

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

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.





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.
- <u>Disable System Messages</u> 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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