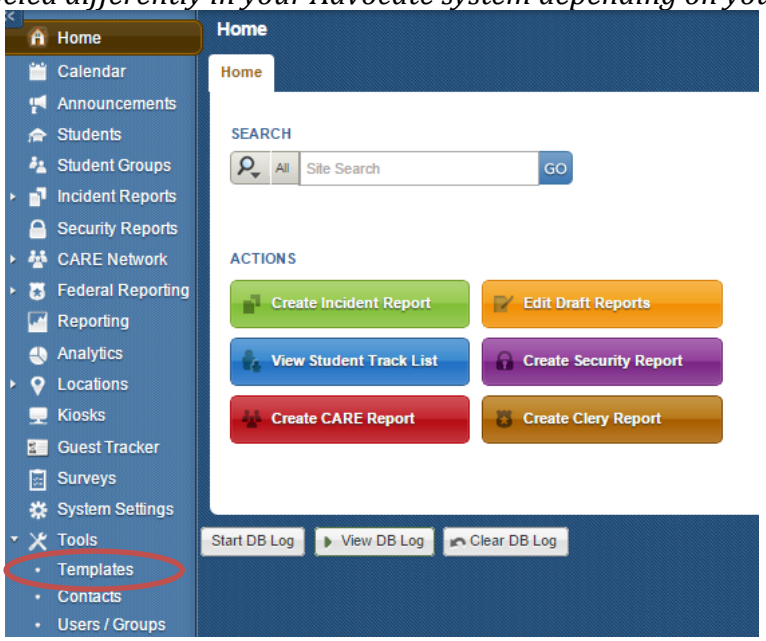
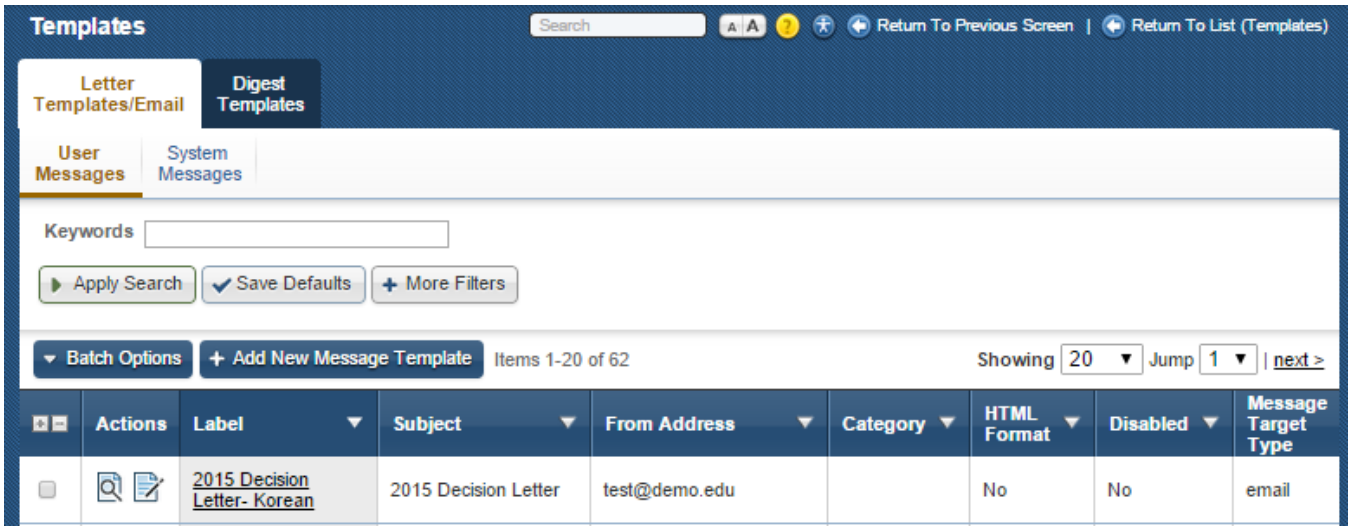
Creating Email and Letter Templates

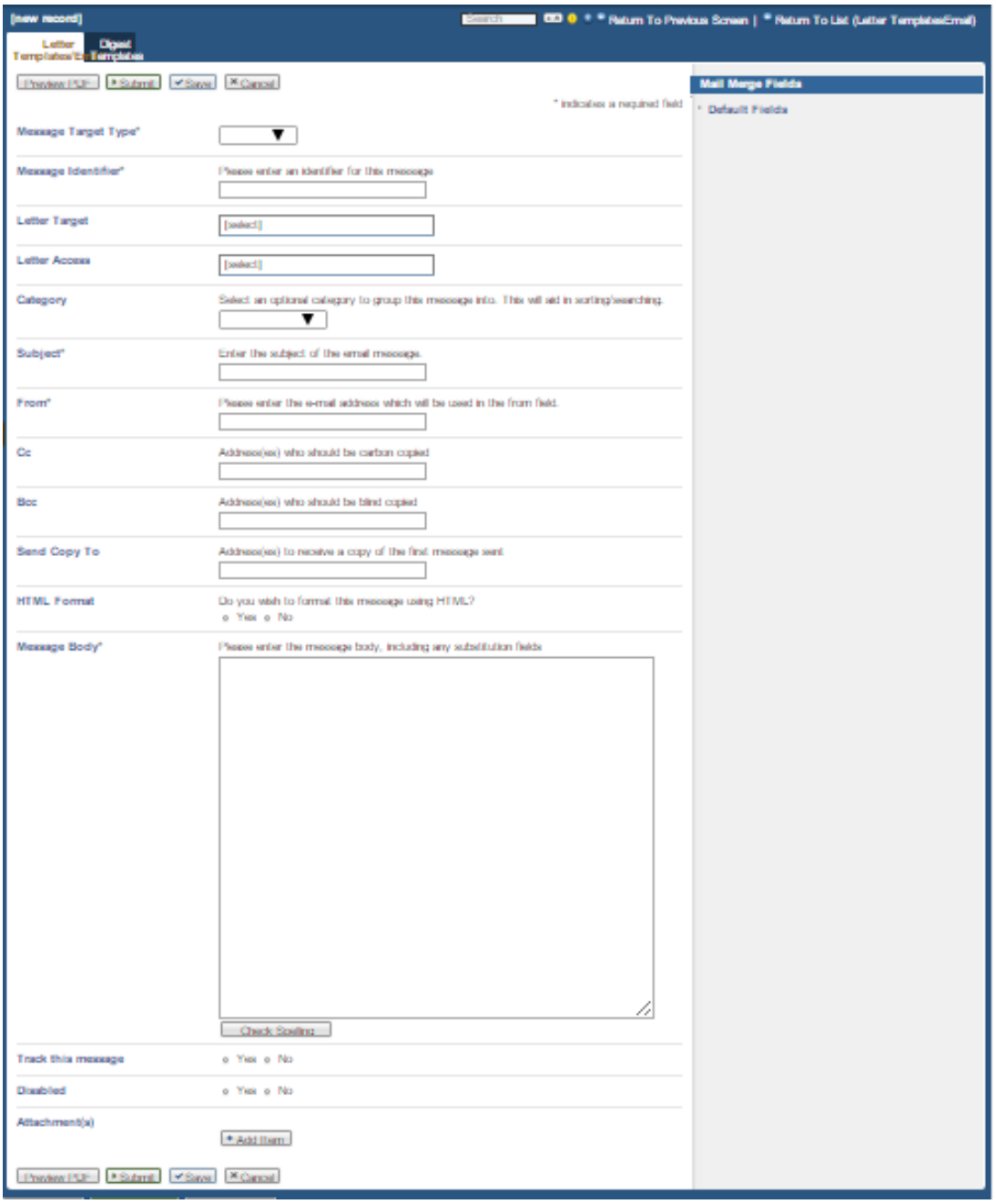
Under Tools in the left navigation menu, click "Templates," and then "Letter Templates/Email".
Note: This may be labeled differently in your Advocate system depending on your Localizations.



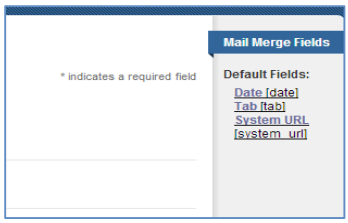
Click "Add New Email Message Template" This button can be found at both the top and the bottom of the list of letter templates.



Complete the form with the desired information as described in the fields below:



- On the right sidebar, and you'll see a list of "Mail Merge Fields". This will include varying fields. After choosing a Letter Target (see Letter Target, below), these may include recipient first and last names, date, sanctions, decisions, charges, and more. Selecting from this list will automatically customize the final versions of the letter before it goes out.



- Message Identifier: This is what will be listed when selecting the template from the Letter Template pull down menu in the Letter tab of Incident Reports and CARE Reports. It is the name of your letter.

- Letter Target: Choose which steps of the process should allow sending this template. Select as many as needed. Merge codes that are appropriate to the chosen target(s) will appear on the right after the template is saved.
  Note: Letter Wizard should only be utilized as a target when you are sending a notification which includes data to merge from only CARE Report or Incident Report respectively. It is not an appropriate target for letters that may be used to communicate about CARE Actions, CARE Meetings, or incident follow-up including meetings, charges/findings of responsibility, and sanctions.

- Letter Access: Restricts which User Groups will be able to access and use the letter. Letter access restrictions also apply to Super Users and only those users who are associated with the group(s) listed will be able to see the template. If you do not wish to restrict which groups of users can utilize this template, you may leave this blank.

- Category: Optionally, create categories and use them to group letters for easier searching and sorting. Categories can be defined the Picklist entitled "Message Template: Categories".

- Subject: This is the subject line that will display to the student in their email inbox.

- From: You can either enter [sender] which will make the email appear to be from whoever is sending it, or you can type in an email address directly, so that all emails of this type appear from the same sender.

- CC: and BCC: Enter the email address for whichever individual(s) should receive a CC/BCC every time this letter is sent. Both the CC and BCC recipients receive a copy of the email sent directly to them with the merged information. Addresses entered in the CC field will not automatically appear in the email cc field. In order for the student to be notified of recipients in the CC field, use the merge code [letter_cc_address] in the body of the letter.

- Send Copy To: acts like CC and BCC. The difference is that the person listed in "Send Copy To" will receive only the first copy of the email. For instance if you are sending email to 5 students, the email in "Send Copy To" receives the first copy while CC and BCC receives all 5 copies. Note that this only applies to batch emails sent via the Student or Sanction list.

- HTML Format: HTML format allows richer editing options including images, highlighting, font changes, and more. Answering "Yes" will replace the "Message Body" dialogue box with two new boxes, one for an HTML version and one for a plain text version. This allows recipients to view the letter regardless of which version their email tool is configured to receive. Be sure to place the text in both areas so that all recipients can view the letter.

- Message Body: Like the HTML and Plain Text options above, this is where you will enter the body of the message. Remember to use the Merge Codes from the list on the right when completing your template.

- Track this Message: When "No" is selected, the letter you create is emailed directly to the student. Selecting "Yes" will instead send an email to the student including a link that the student can follow to view their letter. This allows you to track that the letter has been opened, when, and how many times. When selecting a "Yes" a dialogue box will appear for you to enter the text that will be sent to the student accompanying the link. Use the merge code [track_link] to add the link to the Tracking Message HTML and/or Plain Text areas to generate the URL the student will use to retrieve the letter in the HTML body. .

  Note: Tracking displays the HTML Body of the letter. If "HTML Format" is not marked "yes" and/or the HTML Body does not have letter text, the student will be presented with a blank screen after following the tracking link.

- Attachment(s): You can attach a document (Discipline Statement, Code of Conduct etc.) to the template so that every time this letter is sent, that document will be attached. There will not be an option to customize the attachment when sending, so it should not be used for items that require modification on a per-case basis.

You MUST save your template. To save and remain on this screen, select "Save". To save and be brought back to the main list of letter templates, select "Submit".