LPQI Network Initiative
Phase 2, 2017: Quick E-Mail Template Manager

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Contents

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1. New Module: Quick E-Mail Template Manager

The newly developed module, Quick E-Mail Template Manager, addresses the network's request to be able to customize the e-mail application templates and match those to each program to be consistent across communications.

Reminder: Templates are located on the "Activities" pages under both the Trainees and Faculty headings on the left sidebar. They are part of the 'Quick E-Mail' tool (see screenshots below). **Note:** Programs are now able to include people who are not in the recipient list by using the 'cc' function.

The Quick E-Mail Template Manager is available for Program Directors and Administrators only. It's the last option in the left-hand side navigational menu (see screenshot below).

There are two groups of templates: (1) for Trainees, and (2) for Faculty. Each group contains four templates: two invitations and two reminders. Each template has the same set of fields that can be customized:

Subject (subject line of email template)
From (e-mail "from address")
E-mail body text (content of email template)
- Introduction
- Footer
- Signature

2. E-Mail Template Manager: Two Parts

Each template will have two parts:
- Modify Quick E-Mail Template
- View Delivery Report

Both options can be accessed by clicking on the arrow on the left, next to the template header (see screenshot below):

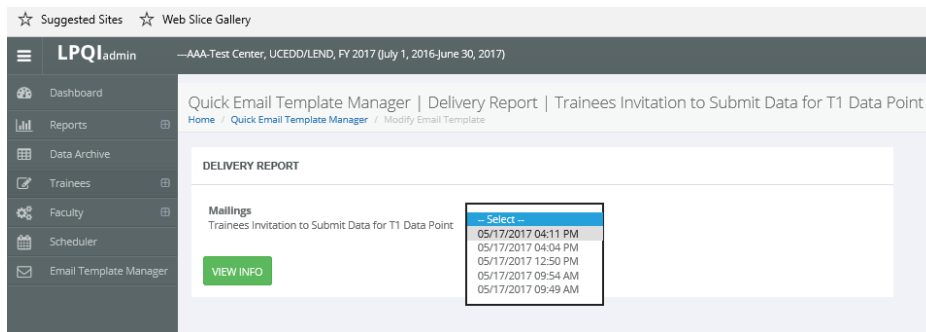## 3. E-Mail Template Manager: Modify E-Mail Template

Custom changes can be canceled by clicking the "Roll Back to Default Template" button. Doing so will restore default, generic text and **all customized changes will not be saved**. i

Trainee and Faculty templates contain two fields that are dynamically generated (i.e. by the system) for each e-mail recipient and those cannot be customized:

- Personalized greeting ("Hello, [trainee or faculty name]")
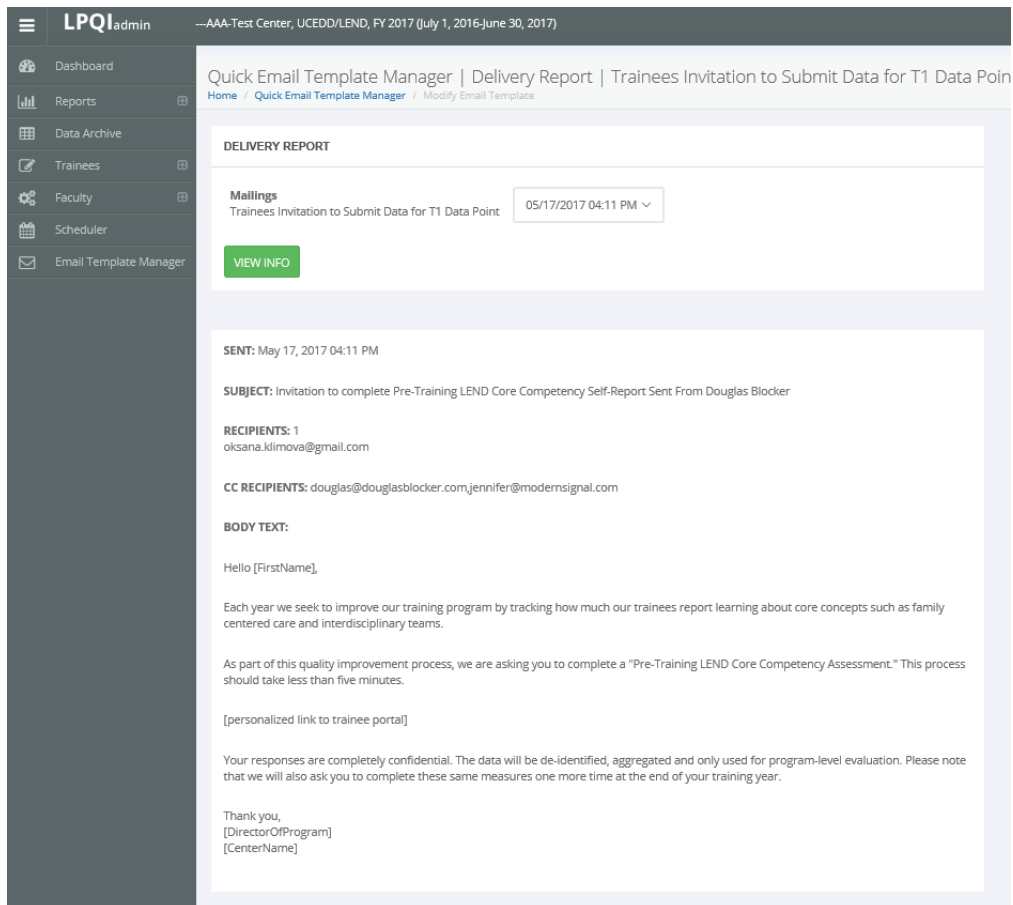- Personalized link to trainee portal (for trainees)

4. E-Mail Template Manager: Delivery Report

Clicking "View Delivery Report" for each template will bring you to the Delivery Report landing page; there, you can select a specific e-mail to review delivery statistics for it.

By clicking the "View Info" button, you will expand screen to access the delivery data. Note: Dynamically generated fields will be displayed in square brackets.