



Banquets - Editing Email Templates

2016 - Winter Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Editing Templates](#)

[Creating New Email Templates](#)

[FAQs](#)

[Best Practices](#)

Overview

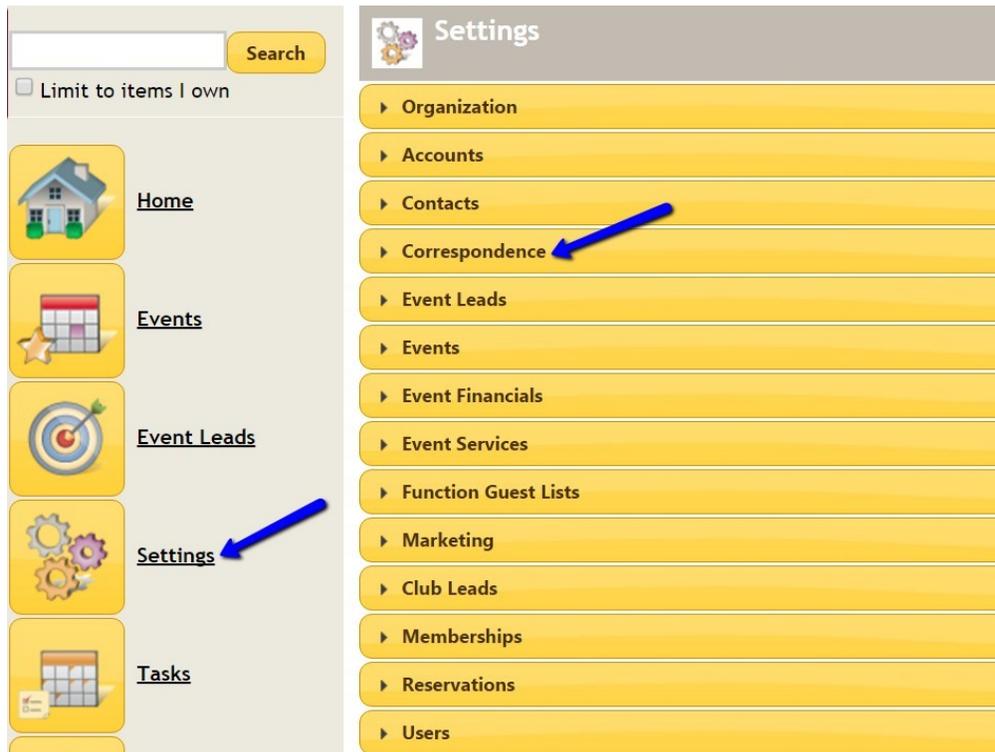
Email Templates offer powerful ways to simplify repetitive email content, while still allowing for flexibility in content adjustment when needed. The **Template** is essentially the framework of the email that is to be repeated. **Templates** can be modified and/or edited as necessary to meet necessary **Event** requirements.

Use Case(s)

Once a Member has signed the contract, the Banquets Manager has historically sent out a personal "Confirmation" Email to the Member outside of the Banquets system, letting them know that the Club has received the signed contract, appreciates their business, and is excited to move forward with them to help create the perfect event. The Club has decided to create an email template for this Confirmation email within the Banquets system, because the majority of the information is the same on every email, and it will save the Banquet Manager time, as well as ensure the framework of the language is consistent from one confirmation email to the next.

Accessing the Tool

Navigate to **Settings**, click **Correspondence**.



Select **Manage Email Templates**.

Correspondence

Template Management

[Manage Document Center](#)

[Manage Document Templates](#)

[Manage Email Templates](#)

Template Field Reference Pages

[Club Lead Merge Field Reference](#) (for templates generated from Club Leads)

[Contact Merge Field Reference](#) (for templates generated from Contacts)

[Event Merge Field Reference](#) (for templates generated from Events)

[Event Lead Merge Field Reference](#) (for templates generated from Event Leads)

[Function Merge Field Reference](#) (for templates generated from Functions)

[Guest List Booking Merge Field Reference](#) (for templates generated from Guest List Bookings)

[Membership Merge Field Reference](#) (for templates generated from Memberships)

[Reservation Merge Field Reference](#) (for templates generated from Reservations)

Click on the **Edit** link next to the **email template** you wish to edit.

 **Settings**
Manage Email Templates

Folder **All Folders** **Add Folder**

New **Done**

Actions	Name	Description	Business Type	Document Type	Folder
View Edit Delete	Event Lead	Used when sending event information before booking an event.	Event Lead	Event Lead	Event Email Templates
View Edit Delete	Step 1 - Inquiry	Used when sending event information and holding a date.	Event	Inquiry	Event Email Templates
View Edit Delete	Step 2 - Proposal	Used when sending a proposal with event details and estimated charges.	Event	Proposal	Event Email Templates
View Edit Delete	Step 3 - Contract (Tentative)	Used when sending a contract for a tentatively booked event.	Event	Contract	Event Email Templates
View Edit Delete	Step 4 - Confirm (Definite)	Used to confirm receipt of a signed contract and/or deposit for a definite booking.	Event	Deposit Received	Event Email Templates
View Edit Delete	Step 5 - Event Order	Used when sending an Event Order with event details and charges.	Event	Event Order	Event Email Templates
View Edit Delete	Step 6 - Guarantee	Used to confirm the guaranteed attendance for an event.	Event	Event Order Cover	Event Email Templates
View Edit Delete	Step 7 - Invoice	Used when sending an invoice with total charges for an event after actualizing the attendance and consumption quantities.	Event	Invoice	Event Email Templates
View Edit Delete	Step 8 - Thank You	Used when sending thank you and evaluation.	Event	Thank You	Event Email Templates
View Edit Delete	Step 9 - Cancellation	Used to confirm the cancellation of an event.	Event	Cancelled	Event Email Templates

Page 1 of 1
50
View 1 - 10 of 10

The **email template** is now available to edit. The **email** may contain '**merge fields**', which are indicated by **brackets { }**. **Merge Fields** are used to display specific information that may be unique to the event, contact, etc.

Save
Cancel

Name	Step 3 - Contract (Tentative)	Business Type	Event
Description	Used when sending a contract for a tentatively booked event.	Document Type	Contract ^
		Folder	Event Email Templates ^

Email Content

Subject Event Contract for \${event.name}

Body

HTML Email
Text Email

<> |  | **B** | *I* | U |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 

Dear \${event.contact.firstName},

Thank you for selecting \${event.site.name} for your upcoming event. Attached is a contract for your review. Please sign and return it along with a deposit of \${event.ext.depositFirstAmount} by \${event.ext.depositFirstDate}.

I look forward to working with you to make this a very successful event. Please don't hesitate to contact me if you have any questions.

Sincerely,

\${event.salesperson.firstName} \${event.salesperson.lastName}
 \${event.salesperson.title}
 P: \${event.salesperson.phone}
 F: \${event.salesperson.fax}
 \${event.salesperson.emailAddress}

Editing Templates

To **edit** the hard coded information, simply type before, over, or after the existing verbiage.

To add or edit a **merge field** in the **email**, navigate to **Settings > Correspondence**, where various **merge field** reference pages can be found. Select the type of reference page needed, find the desired **merge field**, and **copy/paste (Ctrl C/Ctrl V)** the field value into the document.

▼ Correspondence

Template Management

- [Manage Document Center](#)
- [Manage Document Templates](#)
- [Manage Email Templates](#)
- [Template Field Reference Pages](#) 
- [Club Lead Merge Field Reference](#) (for templates generated from Club Leads)
- [Contact Merge Field Reference](#) (for templates generated from Contacts)
- [Event Merge Field Reference](#) (for templates generated from Events)
- [Event Lead Merge Field Reference](#) (for templates generated from Event Leads)
- [Function Merge Field Reference](#) (for templates generated from Functions)
- [Guest List Booking Merge Field Reference](#) (for templates generated from Guest List Bookings)
- [Membership Merge Field Reference](#) (for templates generated from Memberships)
- [Reservation Merge Field Reference](#) (for templates generated from Reservations)

Save once complete.

Save **Cancel**



Name	Step 3 - Contract (Tentative)	Business Type	Event
Description	Used when sending a contract for a tentatively booked event.	Document Type	Contract
		Folder	Event Email Templates

Email Content

Subject: Event Contract for \${event.name}

Body

HTML Email **Text Email**

<> ¶ B I U          A Aa a↑

Dear \${event.contact.firstName},

Thank you for selecting \${event.site.name} for your upcoming event. Attached is a contract for your review. Please sign and return it along with a deposit of \${event.ext.depositFirstAmount} by \${event.ext.depositFirstDate}.

I look forward to working with you to make this a very successful event. Please don't hesitate to contact me if you have any questions.

Sincerely,

\${event.salesperson.firstName} \${event.salesperson.lastName}
\${event.salesperson.title}
P: \${event.salesperson.phone}
F: \${event.salesperson.fax}
\${event.salesperson.emailAddress}

The **email template** is now ready to be sent to clients.

Creating New Email Templates

Creating a new **email template** is very similar to the process of **editing** an existing **email template**.

First, navigate to **Settings**, click **Correspondence**. Next, select **Manage Email Templates**.

▼ Correspondence

Template Management

- [Manage Document Center](#)
- [Manage Document Templates](#)
- [Manage Email Templates](#) ←

Template Field Reference Pages

- [Club Lead Merge Field Reference](#) (for templates generated from Club Leads)
- [Contact Merge Field Reference](#) (for templates generated from Contacts)
- [Event Merge Field Reference](#) (for templates generated from Events)
- [Event Lead Merge Field Reference](#) (for templates generated from Event Leads)
- [Function Merge Field Reference](#) (for templates generated from Functions)
- [Guest List Booking Merge Field Reference](#) (for templates generated from Guest List Bookings)
- [Membership Merge Field Reference](#) (for templates generated from Memberships)
- [Reservation Merge Field Reference](#) (for templates generated from Reservations)

Click the **New** button.

Settings
Manage Email Templates

Folder: All Folders ▲ Add Folder

New Done

Actions	Name ▲	Description	Business Type	Document Type	Folder
View Edit Delete	Event Lead	Used when sending event information before booking an event.	Event Lead	Event Lead	Event Email Templates
View Edit Delete	Step 1 - Inquiry	Used when sending event information and holding a date.	Event	Inquiry	Event Email Templates
View Edit Delete	Step 2 - Proposal	Used when sending a proposal with event details and estimated charges.	Event	Proposal	Event Email Templates
View Edit Delete	Step 3 - Contract (Tentative)	Used when sending a contract for a tentatively booked event.	Event	Contract	Event Email Templates
View Edit Delete	Step 4 - Confirm (Definite)	Used to confirm receipt of a signed contract and/or deposit for a definite booking.	Event	Deposit Received	Event Email Templates
View Edit Delete	Step 5 - Event Order	Used when sending an Event Order with event details and charges.	Event	Event Order	Event Email Templates
View Edit Delete	Step 6 - Guarantee	Used to confirm the guaranteed attendance for an event.	Event	Event Order Cover	Event Email Templates
View Edit Delete	Step 7 - Invoice	Used when sending an invoice with total charges for an event after actualizing the attendance and consumption quantities.	Event	Invoice	Event Email Templates
View Edit Delete	Step 8 - Thank You	Used when sending thank you and evaluation.	Event	Thank You	Event Email Templates
View Edit Delete	Step 9 - Cancellation	Used to confirm the cancellation of an event.	Event	Cancelled	Event Email Templates

⌂ << Page 1 of 1 >> 50 ▼ View 1 - 10 of 10

Begin drafting the **new email template**. Be sure to choose a **Business Type** (event, contact, lead, etc.), a **Document Type** and a **Folder** for the email to live in.

The screenshot shows the 'Settings Add Email Template' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them are three rows of settings: 'Name' with the value 'Name the Email Template', 'Description' with 'Create a description', and three dropdown menus for 'Business Type' (set to 'Event'), 'Document Type' (set to 'Inquiry'), and 'Folder' (set to 'Event Email Templates'). Blue arrows point to each of these dropdown menus. Below the settings is the 'Email Content' section, which has a 'Subject' field with the placeholder 'Create a subject line (you can use merge fields here!)' and a 'Body' field. The 'Body' field has a rich text editor with tabs for 'HTML Email' and 'Text Email', and a toolbar with various formatting options. The body text reads: 'Draft the body of the email template..' followed by a note: '*To add or edit a merge field in the email, navigate to Settings > Correspondence, where various merge field reference pages can be found. Select the type of reference page needed, find the merge field desired, and copy/paste (Ctrl C/Ctrl V) the field value into the document.'

Note: if at any point you need to navigate away from the edit screen, **click the Save button** so that you do not lose your work!

When you have finished creating the **new email template**, **click Save**.

FAQs

Q: How do I know what merge field to use?

A: Depending on your needs, all applicable merge fields can be found in **Settings** >**Correspondence**, then merge fields.

Q: Can I edit the email template within the event?

A: Yes, you will be able to edit the email once you select and open it. You can then make as many changes as you'd like.

Best Practices

1. Give the new template a new name; using "Revised" is a good practice.
2. Test the email after making changes to make sure that all the information is showing as you would like it to.