Onsite Inventory Email Templates

Summary: A set of custom email templates can be created that can be used to send emails to customers on demand. The templates are HTML based and allow for a highly customized email message. Templates can be created on an event level or an account level. Account level templates can be copied to the event level. This allows for adjustments to the templates for a specific event without affecting the account level template. Events that do not define any email templates will automatically inherit the account level templates. This inheritance is by reference; meaning changes to an Account template will have the same changes to other Events that are using the template.

Table of Contents:

Account Level Templates:

1. Navigate to the Onsite Inventory Management Portal.
2. Select the *Defaults* tab from the tab menu at the top.
3. Scroll to panel labeled *Email Templates*.

Event Level Templates:

1. Navigate to the Onsite Inventory Management Portal.
2. Select an Event from the *Events* table by clicking on the name.
3. Hover over the *Event Settings* menu and select *Email*.
4. Scroll to the panel labeled *Templates*.

Creating a Template:

1. Using the dropdown in the panel header select **New Template**. This will always be the first template listed.

2. Give the template a user friendly name. This name is used to identify the template in the management interface as well as in the Onsite Inventory. The name cannot be longer than 50 characters.

3. Enter the desired email Subject and Body. Outside HTML body templates can be pasted into the editor by clicking the **Source** button in the editor. This will display the template HTML.

   Text placeholders can be substituted in both the Subject and Body. These placeholders will automatically be replaced with Customer/Event level information when processed by the Onsite Inventory. All Account/Event custom fields are made available as placeholders. These are located at the bottom of the text placeholder list. They are bolded as well. Be sure to **include** the curly brackets that surround the placeholder.

   {SWIFT_SHOW_NAME}

   {DIRECTDOWNLOAD}

   {Picked up By}

   {Favorite Color}
   what is the client's favorite color? This is used in their gift basket.

   There is the option to use a system default template as a starting point for a new template. Press the **System Template** button to populate the Subject and Body fields with the system template information.

4. Before Switching to a different template, always be sure to press **Save Template**. Otherwise, all changes will be lost.

Templates

Create custom email message templates that will be emailed to customers using the Onsite Inventory.

Send Log-In Credentials

| 🖫 Save Template | 👤 Account Templates | 🗏 System Template | 📋 | 🗑 |

* Template Name

Send Log-In Credentials

* Email Subject

{EVENT_NAME} - Exhibitor Lead Log In

Maximum template size: 7338/20000

Text Placeholders

{COMPANY}

{BOOTH}

{CONFIRMATION_ID}

{EMAIL}

To duplicate a template, press the copy icon. This will create a duplicate template name with the indicator **(Duplicate)** appended to the name. Before duplicating a template, be sure to press **Save Template**. Otherwise, the current template's changes will be lost.
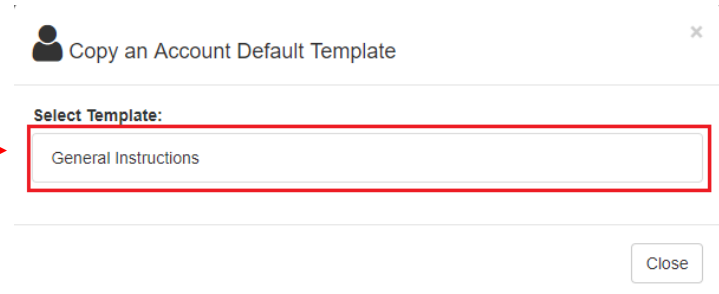
Copy an Account Level Template to an Event:

1. Before copying an Account level template, be sure to save any changes that have been made to the selected template. Otherwise, they will be lost!
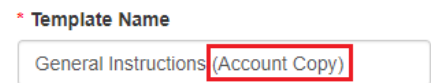
2. Select the **Account Templates** button.

3. A window will appear with a list of all Account Level templates.

4. Select the desired template.

5. The window will automatically close and the panel will switch to the copied template. This template has the indicator **(Account Copy)** appended to the name. Note, the template has not been saved yet.

6. Make any changes to the name, subject and body of the template.

7. Press **Save Changes** when all changes have been made.

Deleting a Template:

1. Select the template to be deleted from the dropdown in the panel header.
2. Press the *Delete* button or trash bin icon. Await the notification indicating a successful deletion.

Note: The system currently lacks a way to delete unwanted template drafts. To delete these drafts, refresh the page. Switching to another template and saving any changes will also save the unwanted draft.

Sending Emails to Customers:

Once all Account/Event templates have been configured in the management interface, they will be made available in the onsite inventory. The email button will be transformed into a dropdown selection when two or more templates are available for the event. Otherwise, no dropdown selection will be available, only a single button without an arrow pointing down.
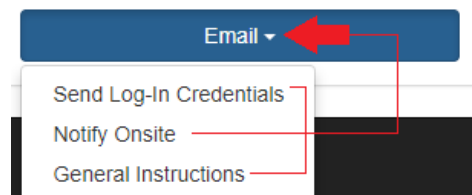
The system default template will automatically be used when there are no Account or Event level templates available. The Account level templates will automatically be used when there are no Event level templates available.