Email Template Manager

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The instructions in this article relate to **Management Fees Setup.** The icon may be located on your StrataMax Desktop or found using the StrataMax Search.

A tailored email subject and body can be configured for emails sent for many types of reports and documents throughout StrataMax, such as *Levy Notices*, *Levy Arrears Notices*, *Merge Letters*, *Office Bearers*, *Remittance Advice* and more! It is possible to create a Local (per property) or Global (full portfolio) email template with merge fields which will automatically populate the information into the email at the time of sending. For the areas that use the Report Distribution window, a temporary email detail can be inserted, which can assist with one-off instances may need an adjustment on what is included.

Merge fields can also be used in emails to assist with aggressive spam filters allowing receipt of bulk emails for recipient.

Email Template Manager | Permissions

The *Security Setup* permissions must have access granted to use this screen, whether that be from the desktop icon, or from within another screen, as well as view and adjust the different email report types.

😨 Permissions For	_		×
Name Users			
BCMax GLMax DocMax			
Permissions Levies Construction Construc			
Email Template Filter		Clos	se

Email Template Manager | Access

Opening the *Email Template Management* screen can be done from either the desktop icon, the desktop *Search* field, or from within other screens in StrataMax, and all open the same screen.

If you open the *Email Template Manager* from within another StrataMax screen, the *Template Type* drop-down in the top left will automatically have the corresponding template selected. For example, if opened from within the *Merge Letters* screen, then the 'Merge Letter' *Template Type* will be selected automatically.

Report Distribution -	- 🗆 ×			
Merge Letter	0			
Building:				
Report Set: 💦 🔽 Page Numbers	Distribution Method			
+ Report Attachment	🔄 🖶 Post Upload to Bing EasyMail			
- Report Matachment	🖌 🖂 Email 😽			
	Use BING for Email			
	Email Subject:			
Recipient Type: Owner 🗡	<buildingname> (BuildingNumber> Lot <recipientlotnumber> Correspondence</recipientlotnumber></buildingname>			
Filters	Email Body:			
Email Template Management	- 🗆 X			
Template Type: Merge Letter	Search Building Name / Number 🔍			
Global Template	hers Correspondence 💦 😽			

Email Template Manager | Create, Edit, Delete Templates

- 1. Search or select Email Template Management.
 - As mentioned in the above section, the *Email Template Management* screen can also be opened from other menus throughout StrataMax.
- 2. Ensure you have the required template selected in the Template Type drop-down menu.

🔋 Email Temp	olate Management		- 0	×
Template Type:	Merge Letter	× 2 Search Building Name	/ Number	Q
	Levy Arrears Notice			
	Work Order Activity			
Buildin -	Work Order Copy	.otNumber> Correspondence		×
	Work Order Quote Cancellation			
Building Speci	Work Order Quote Confirmation			
Building	Work Order Quote Rejection	 Subject 		~
25907	Work Order Quote Request			
1234568	Work Order To Contractor			

- 4. If there is no Global Template set, click the Pencil icon on the far right to create one. If a Global Template exists already, then click the Pencil icon on the far right to modify it, or the Red Cross icon to delete it.
 - If a LocalTemplate is being managed, search for the specific property using the Search Building Name / Number field in the top right, then highlight the property and click on the Pencil icon to modify, or the Red Cross icon to delete it.
- 5. When the actual email template opens, modify the subject in the *Subject* line, and in the *Body* field, enter the body of the email.
- 6. Merge fields can be inserted in both the *Subject* and *Body* by clicking the *Insert Field* button. These may vary depending on what template type is being set.

📄 Email	Template Setup - Merge Letter	_		\times
Template:	Merge Letter			
Building:	Global - Applies to all buildings without a template			
Subject:	<buildingname> <buildingnumber> Lot <recipientlotnumber> Correspondence</recipientlotnumber></buildingnumber></buildingname>			
Body:	Hello <recipientlettertitle>,</recipientlettertitle>			
	Please find attached your latest correspondence relating to Lot <recipientlotnumber> for</recipientlotnumber>	or <build< td=""><td>ingName</td><td>> <bu< td=""></bu<></td></build<>	ingName	> <bu< td=""></bu<>
	Making a change for the log.			
				>
	If a default email signature is configured then it will be ap 6 to the email body auton	natically	when sen	ding.
	Insert Field SC	ancel	Sa	ve

- 7. When done, click Save.
- 8. When an email is sent for the selected template type the *Subject* and *Body* of the email will use the template text and the data for each *Merge Field* will be included in the email.
 - Send a test email of the report to your email address to ensure the email template is set as required.

Email Template Manager | Copying Local Templates

1. To copy a *Local Template* to other properties, click the middle *Papers* icon to copy that local template to other buildings.

🖣 Email Template Manage	ement		-		×
emplate Type: Merge Lette	er 🗸	1	Search Building Name / Number		Q
lobal Template │	Buildincipien	tLotNum	iber> Correspondence	1	×
uilding Specific Template	es				
uilding Specific Template Building Number	es Bu	•	Subject		^
31 1		•	Subject Lot <recipientlotnumber> <buildingname> CTS <buildingctsnumber></buildingctsnumber></buildingname></recipientlotnumber>	1	
Building Number	Bu	•	-	1	×

2. Tag any buildings ('Tag' column on the left) to receive the local template and click OK.

Temporary Email Details

Any area that uses the Report Distribution window will allow a temporary email detail to be applied. These oneoff instances can help direct communication with specific information. This temporary email subject and body will be discarded when the Report Distribution window is closed.

- 1. Search or select a report using Report Distribution or *Merge Letters*.
- 2. From the Distribution Method area, click the email cogwheel and then the pencil icon.
- 3. Update the Subject and Body as needed, using Insert Field to insert any merge fields.
- 4. Proceed to distribute the reports or *Merge Letters* as required.