

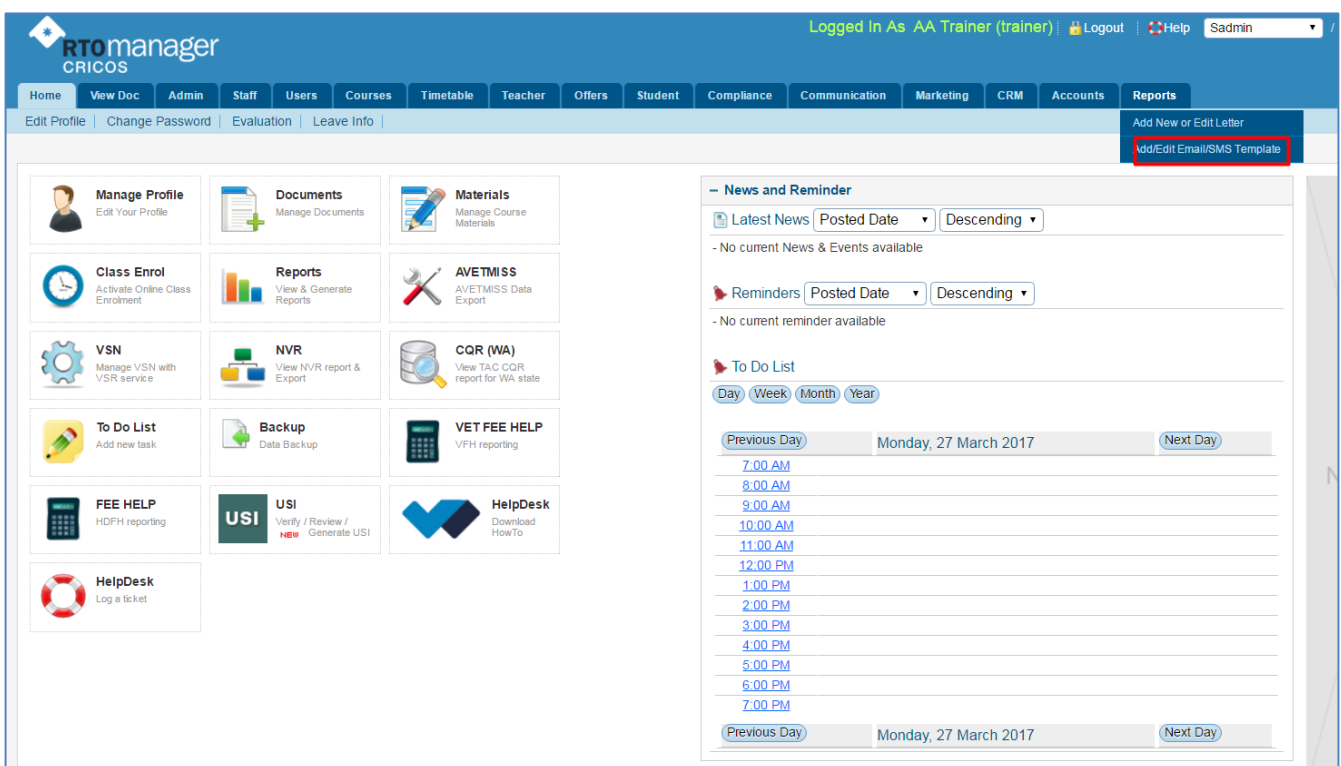
Set Up Template Quick Guide

This function allows you to set up your **email** and **SMS templates**. Availability of these template saves you time in sending communication to your stake holders e.g. *students, agents, staff and providers*.

Email templates can range from Welcome Letter to students. Orientation information to Payment Reminders etc. For Agents, it can be Course Promotion letters and other marketing related information.

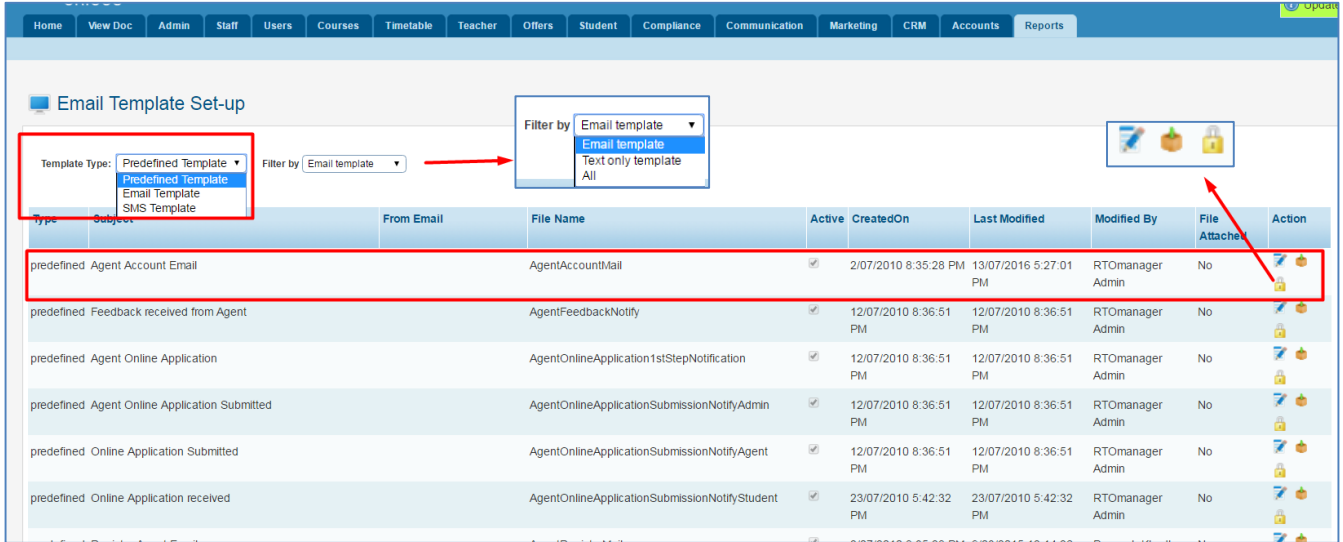
To manage this function, follow the instructions below:













1. On your RTOManager, click **Reports > Add/ Edit Email/SMS Template**




The screenshot shows the RTOManager CRICOS dashboard. The user is logged in as 'AA Trainer (trainer)'. The navigation menu includes: Home, View Doc, Admin, Staff, Users, Courses, Timetable, Teacher, Offers, Student, Compliance, Communication, Marketing, CRM, Accounts, and Reports. The 'Reports' menu is expanded, showing options like 'Add New or Edit Letter' and 'Add/Edit Email/SMS Template', which is highlighted with a red box. The main dashboard area contains various functional tiles such as 'Manage Profile', 'Documents', 'Materials', 'Class Enrol', 'Reports', 'AVETMISS', 'VSN', 'NVR', 'CQR (WA)', 'To Do List', 'Backup', 'VET FEE HELP', 'FEE HELP', 'USI', 'HelpDesk', and 'HelpDesk'.

2. For email Template set up, select **Template Type** from the drop down menu. You can also filter your search by selecting *text only template* or *all* (as shown below).



Type	Subject	From Email	File Name	Active	CreatedOn	Last Modified	Modified By	File Attached	Action
predefined	Agent Account Email		AgentAccountMail	✓	2/07/2010 8:35:28 PM	13/07/2016 5:27:01 PM	RTOManager Admin	No	 
predefined	Feedback received from Agent		AgentFeedbackNotify	✓	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTOManager Admin	No	 
predefined	Agent Online Application		AgentOnlineApplication1stStepNotification	✓	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTOManager Admin	No	 
predefined	Agent Online Application Submitted		AgentOnlineApplicationSubmissionNotifyAdmin	✓	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTOManager Admin	No	 
predefined	Online Application Submitted		AgentOnlineApplicationSubmissionNotifyAgent	✓	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTOManager Admin	No	 
predefined	Online Application received		AgentOnlineApplicationSubmissionNotifyStudent	✓	23/07/2010 5:42:32 PM	23/07/2010 5:42:32 PM	RTOManager Admin	No	 

Note: Your RTOManager has predefined templates that are ready for use. You may edit the template according to your college's specification.

3. To make any changes in the predefined template, Click **Edit Icon**  to edit content.

Email Subject:

From Email:

Template Name: **AgentAccountMail** *

Recipient: all

Is Text Only? (Not Email)

Template Editor

parameters

parameters

Password

PasswordAnswer

PasswordQuestion

UserName

WecosysURL

Dear Sir,

We are pleased to welcome you as one of our valued agents!

You may now use the system agent portal to apply a course for your student and manage your commissions, view and edit your profile, and view payment information. Your account was set up as below;

Username: {UserName}

Password: {Password}

To reset your password, you must answer the following question:

Password Question: {PasswordQuestion}


Password Answer: {PasswordAnswer}

Login to the website: {WecosysURL}

Looking forward to a mutually beneficial business relationship.

Best Regards},

College administrator


3. To **manage attachment** and **add files** to the template, click this  icon. This will allow you to add attachments to your email. A pop up box will appear to allow you to attach your file (as shown below).


File Attachment

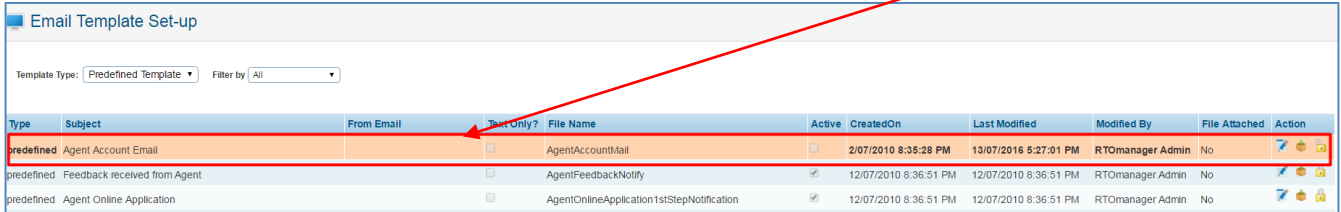
File attachment 1: No file chosen










File attachment 2: No file chosen



File attachment 3: No file chosen

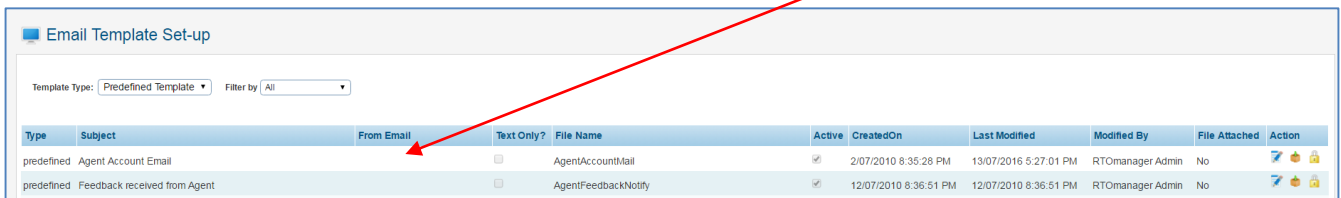
 No file attached







4. You can also set these templates **“Inactive”** by clicking the Lock icon . Template will be locked and will be marked by changing the colour as shown below.



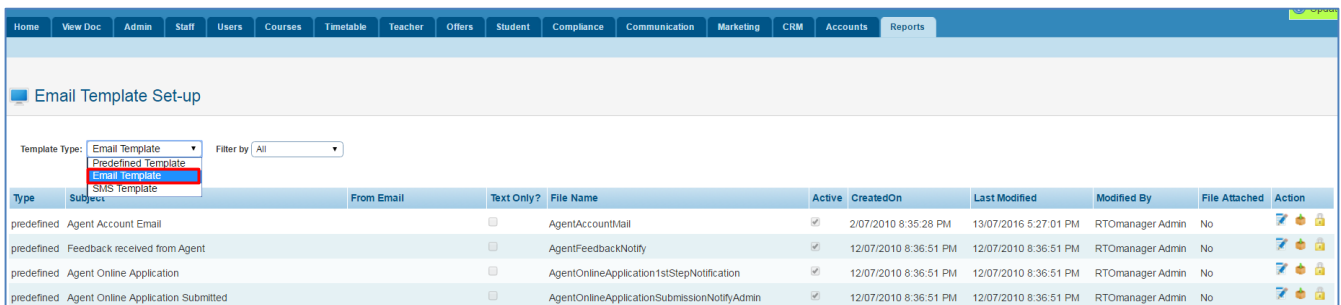
Type	Subject	From Email	Text Only?	File Name	Active	CreatedOn	Last Modified	Modified By	File Attached	Action
predefined	Agent Account Email		<input type="checkbox"/>	AgentAccountMail	<input type="checkbox"/>	2/07/2010 8:35:28 PM	13/07/2016 5:27:01 PM	RTomanager Admin	No	  
predefined	Feedback received from Agent		<input type="checkbox"/>	AgentFeedbackNotify	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  
predefined	Agent Online Application		<input type="checkbox"/>	AgentOnlineApplication1stStepNotification	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  













Note: You can set the template to active again by clicking the unlock icon . Icon will change to a Lock icon  and colour will return to the original colour.



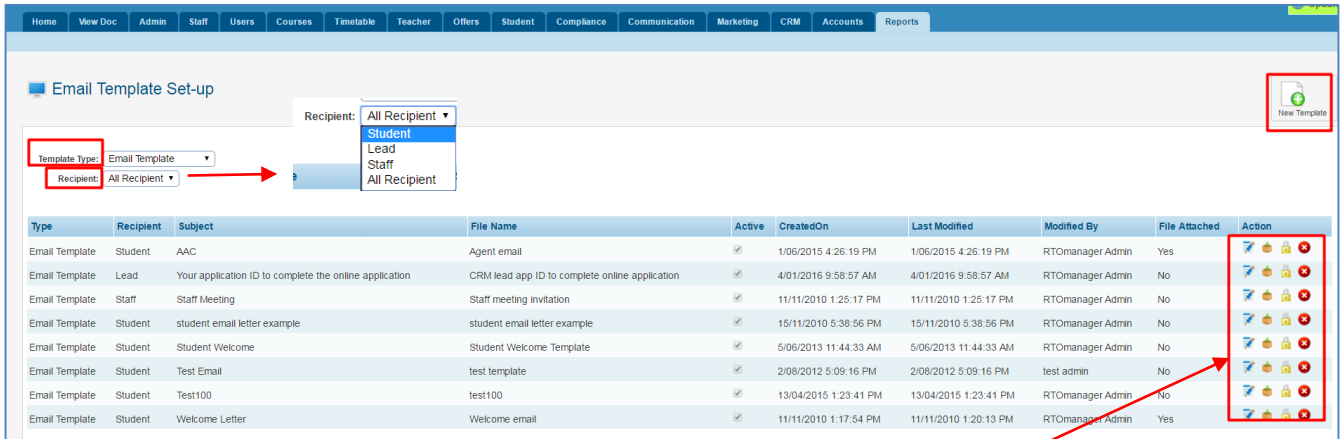
Type	Subject	From Email	Text Only?	File Name	Active	CreatedOn	Last Modified	Modified By	File Attached	Action
predefined	Agent Account Email		<input type="checkbox"/>	AgentAccountMail	<input checked="" type="checkbox"/>	2/07/2010 8:35:28 PM	13/07/2016 5:27:01 PM	RTomanager Admin	No	  
predefined	Feedback received from Agent		<input type="checkbox"/>	AgentFeedbackNotify	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  

5. To Create New Email template, Select **Email Template** from the Template type drop down menu.



Type	Subject	From Email	Text Only?	File Name	Active	CreatedOn	Last Modified	Modified By	File Attached	Action
predefined	Agent Account Email		<input type="checkbox"/>	AgentAccountMail	<input checked="" type="checkbox"/>	2/07/2010 8:35:28 PM	13/07/2016 5:27:01 PM	RTomanager Admin	No	  
predefined	Feedback received from Agent		<input type="checkbox"/>	AgentFeedbackNotify	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  
predefined	Agent Online Application		<input type="checkbox"/>	AgentOnlineApplication1stStepNotification	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  
predefined	Agent Online Application Submitted		<input type="checkbox"/>	AgentOnlineApplicationSubmissionNotifyAdmin	<input checked="" type="checkbox"/>	12/07/2010 8:36:51 PM	12/07/2010 8:36:51 PM	RTomanager Admin	No	  

6. Select **Recipient** from the drop down menu as shown below.



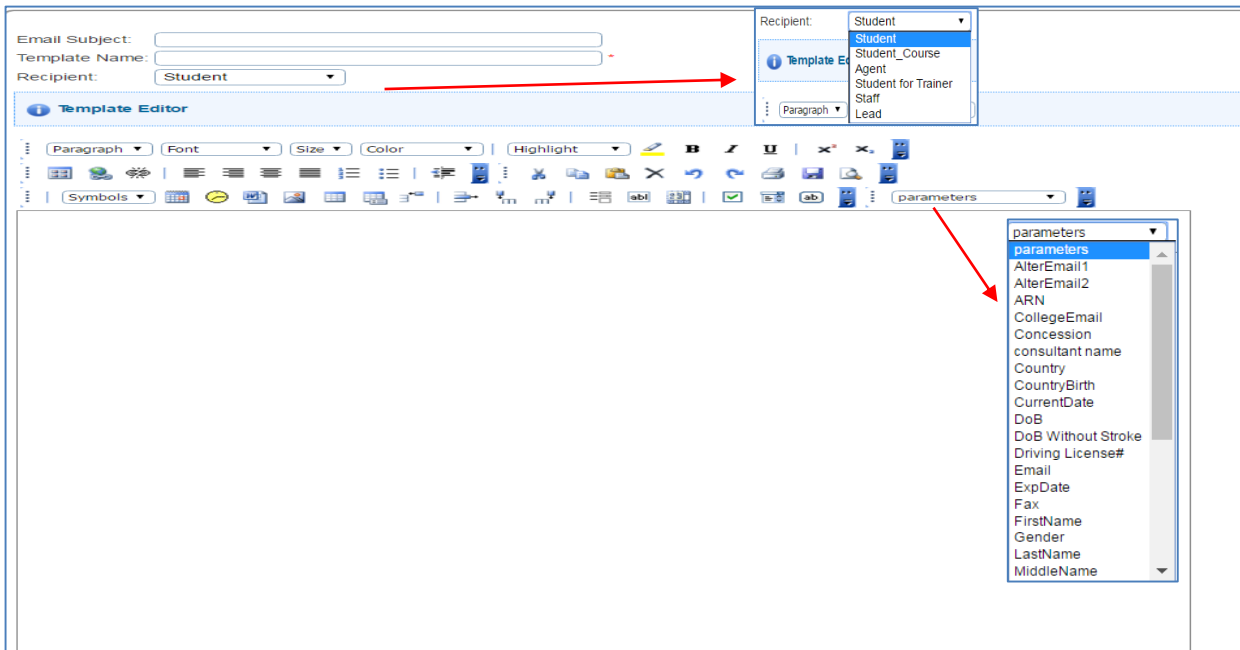
Type	Recipient	Subject	File Name	Active	CreatedOn	Last Modified	Modified By	File Attached	Action
Email Template	Student	AAC	Agent email	✓	1/06/2015 4:26:19 PM	1/06/2015 4:26:19 PM	RTomanager Admin	Yes	[Edit] [Lock] [Delete]
Email Template	Lead	Your application ID to complete the online application	CRM lead app ID to complete online application	✓	4/01/2016 9:58:57 AM	4/01/2016 9:58:57 AM	RTomanager Admin	No	[Edit] [Lock] [Delete]
Email Template	Staff	Staff Meeting	Staff meeting invitation	✓	11/11/2010 1:25:17 PM	11/11/2010 1:25:17 PM	RTomanager Admin	No	[Edit] [Lock] [Delete]
Email Template	Student	student email letter example	student email letter example	✓	15/11/2010 5:38:56 PM	15/11/2010 5:38:56 PM	RTomanager Admin	No	[Edit] [Lock] [Delete]
Email Template	Student	Student Welcome	Student Welcome Template	✓	5/06/2013 11:44:33 AM	5/06/2013 11:44:33 AM	RTomanager Admin	No	[Edit] [Lock] [Delete]
Email Template	Student	Test Email	test template	✓	2/08/2012 5:09:16 PM	2/08/2012 5:09:16 PM	test admin	No	[Edit] [Lock] [Delete]
Email Template	Student	Test100	test100	✓	13/04/2015 1:23:41 PM	13/04/2015 1:23:41 PM	RTomanager Admin	No	[Edit] [Lock] [Delete]
Email Template	Student	Welcome Letter	Welcome email	✓	11/11/2010 1:17:54 PM	11/11/2010 1:20:13 PM	RTomanager Admin	Yes	[Edit] [Lock] [Delete]

7. Email templates created will be shown as a list. You may *edit letter content, manage File attachments, set template to active/inactive* and delete template by clicking the **action icons** located on the right hand side of the page.

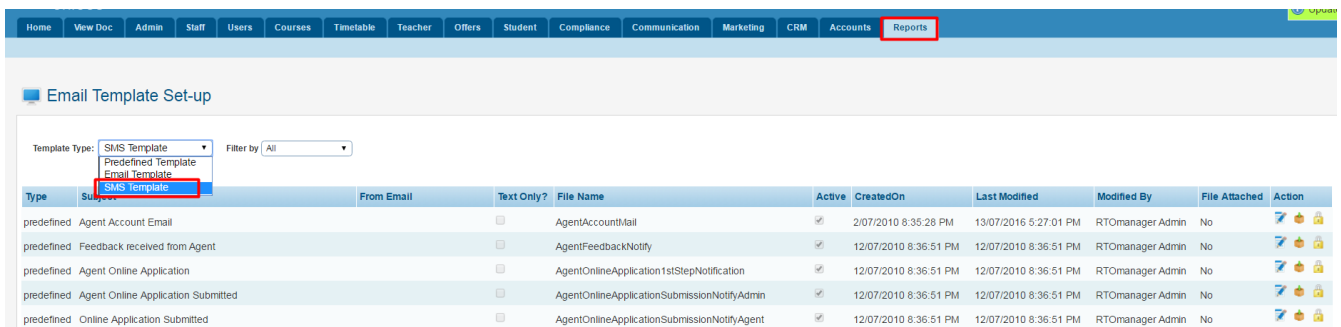
8. To create new template, Click **Add New template** icon .

9. A template editor will allow you to enter relevant information such as *Email subject, template name and recipient* (as shown below).

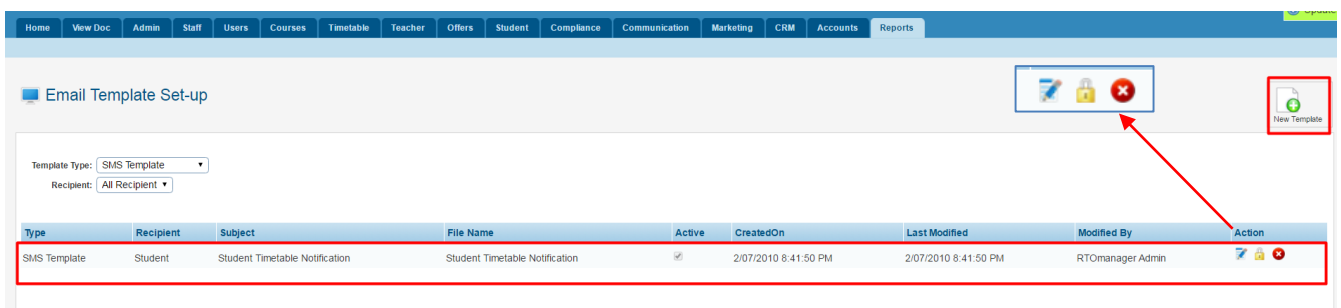
Note: On the body of the email, the system can identify parameters you may have used to automatically populate the parameter values e.g. Student first name, last name, date of birth (DOB), student ID etc.)



10. To set Up **SMS Template**, select SMS template from the Template type drop down menu as shown below:

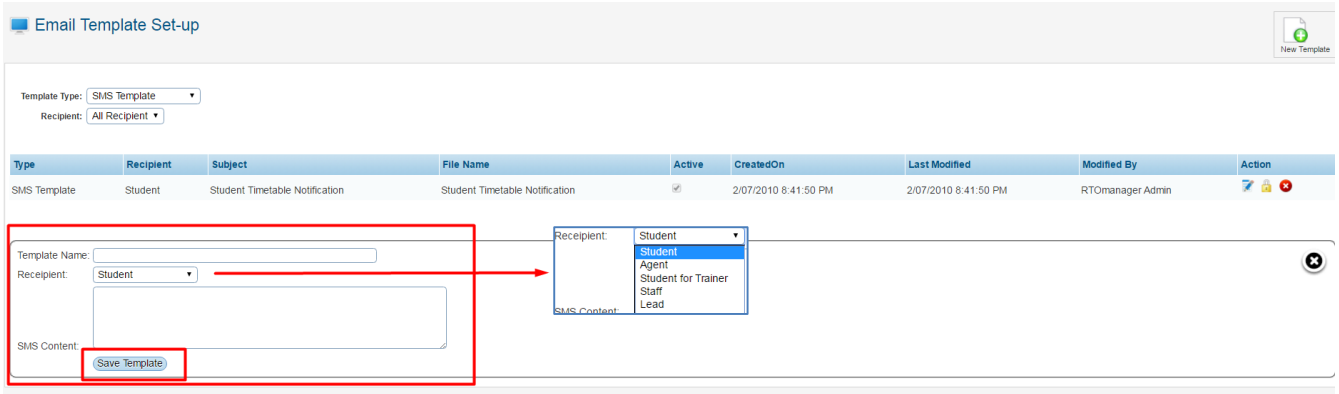


11. **SMS templates** that has been created will show up in the list below. You can manage the existing templates by performing the following actions e.g. **edit SMS content**, **set template to active/inactive** and may also **delete** the template (if required).



Note: RTOManager has the capacity to integrate SMS capability from a third party provider to send bulk and/or individual text/ SMS messages.

12. Click **New Template** icon to create a new SMS template.



Type	Recipient	Subject	File Name	Active	CreatedOn	Last Modified	Modified By	Action
SMS Template	Student	Student Timetable Notification	Student Timetable Notification	<input checked="" type="checkbox"/>	2/07/2010 8:41:50 PM	2/07/2010 8:41:50 PM	RTOManager Admin	

12. Select intended **Recipient** from the drop down menu.

13. Enter relevant information e.g. *Template name* and *SMS Content* and click **Save template**.