

Email Templates

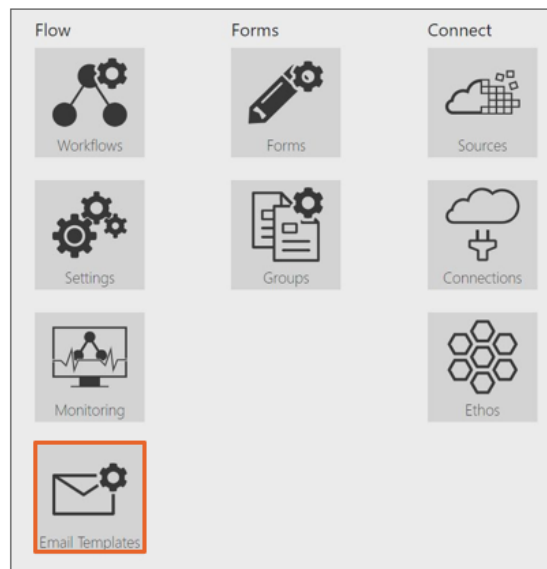
Inside this section:

- [Email Templates](#)
- [Adding and Editing an Email Template](#)
- [Email Template Keys](#)
- [Delete an Email Template](#)
- [Using Email Template in Notify Setting](#)
- [Markdown Language in Email Body](#)
- [Email Template Example with Markdown and Keys](#)
- [Unique Notification Subject Lines Using Email Templates Keys](#)

Email Templates

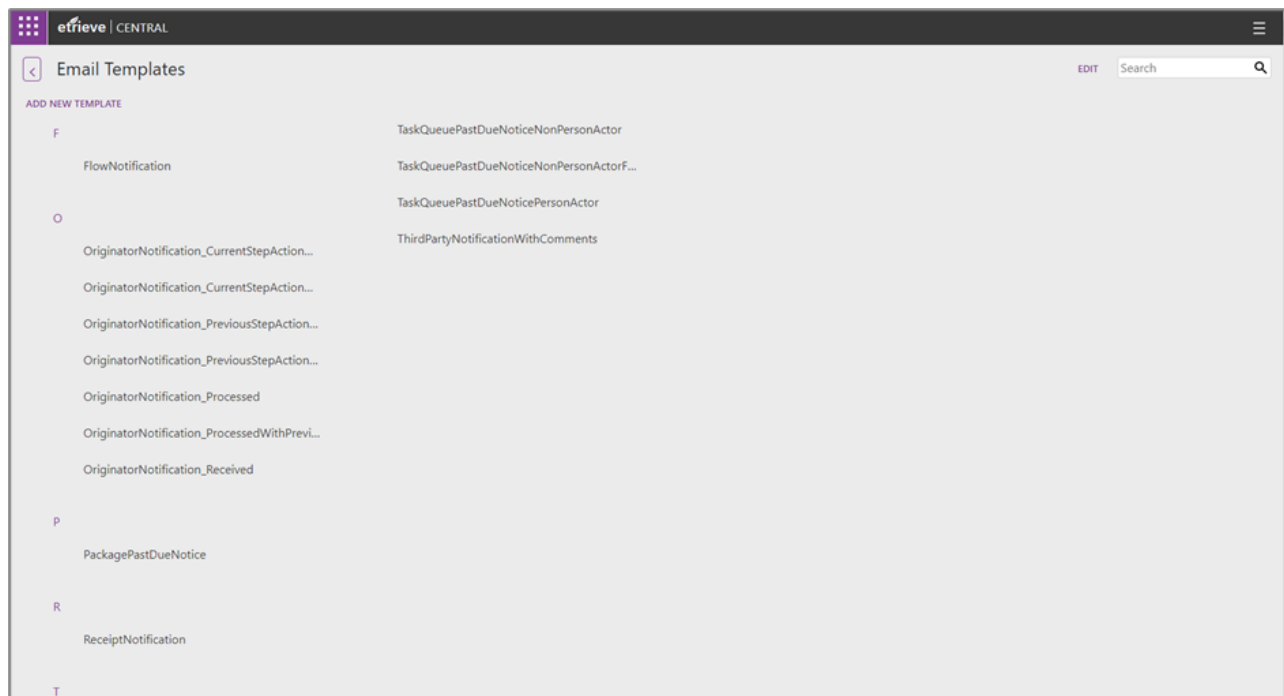
Email Templates allow Central Administrators to create, modify, and delete custom email templates that integrate into Workflow notifications.

Email Templates is a feature available from the settings menu in Etrieve Central by selecting “Email Templates” as illustrated below.



Email Template menu item

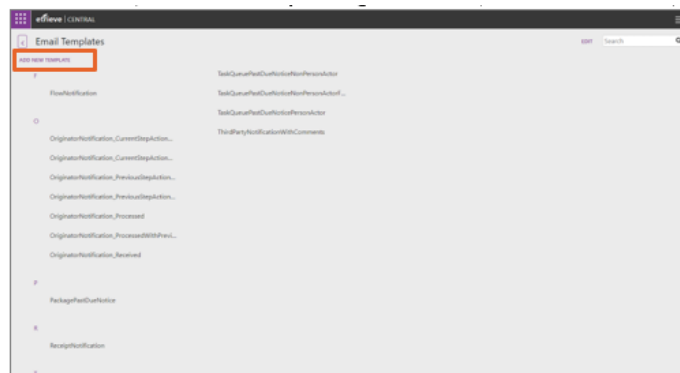
The page for Email Templates appears as shown below, with a list of all the currently created email templates organized by name.



Email Template Main Menu

Adding and Editing an Email Template

A new Email Template can be added by selecting "Add New Template" from the Email Template page.



Email Template Add New Template button

Once selected, the administrator will navigate to a new page with the General Settings for the new template.

etrieve | CENTRAL

Back

General Settings

Save

Name (Name is required)

Name

Subject (Subject is required)

Subject

Body (Body is required)

COPY & EDIT

Email Template "Add New Template" General Settings page

Under "General Settings," the administrator will be required to fill out three sections: Name, Subject, and Body. When finished, the administrator can select "Save" from the left-side panel and the template will be saved to available templates.

Otherwise, once the administrator fills out the required fields, he or she can also select "Copy & Edit" from the General Settings page to create a duplicate of the email template, which will navigate to a new email template setup page with a copy of the information in the fields from the original template. If the administrator selects instead the drop-down arrow beside "Copy & Edit," he or she will be given the option to simply select "Copy" to copy the email template, which will simply make a duplicate and automatically save it without the option to edit it first, leaving the original template open. All templates must have unique names.

etrieve | CENTRAL

Back

General Settings

Save

Name

Name of Template

Subject

Subject to Email

Body

Email contents are found here.

COPY & EDIT

COPY

Email Template Copy and Copy & Edit selections

If the administrator does not save the template before selecting "Copy" or "Copy & Edit," a warning notification will appear to ask whether or not to discard the changes made to the current template.

Discard Changes?

There are unsaved changes. Leaving without saving will discard any changes. Would you like to continue and lose any changes?

CONFIRM CANCEL

In order to edit a template, a user must simply select the name of the template from the Email Template landing page. The page to edit a template is identical to the page for adding a template—simply fill out the information and select “Save.”

Email Template Keys

When creating or editing an email template, the administrator may want to utilize Email Template Keys to display variable data that will be taken from the workflow where the email template is used. Users can select ‘SHOW’ in the bottom right corner of the edit/add email template page to see a list of available keys. Selecting on an Email Template Key copies it to the clipboard for convenient pasting into the email body.

etrieve | CENTRAL

Back

General Settings

Save

Name

Email Template

Subject

Email Template Notification Email

Body

Testing email template notification

COPY & EDIT

EMAIL TEMPLATE KEYS HELP

SHOW

Email Template Keys

etrieve | CENTRAL

Back

General Settings

Save

Name

Email Template

Subject

Email Template Notification Email

Body

Testing email template notification

EMAIL TEMPLATE KEYS HELP

CLOSE

Click on the key to copy to the clipboard

Search

EMAIL TEMPLATE KEY	DESCRIPTION
<%= ActivityPackageDeepLinkUrl %>	A deep link that points directly to the package in the user's activity.
<%= CurrentStepActor %>	The actor who currently made an action on the package.
<%= CurrentStepComment %>	The comment that was made for the package at the current step.
<%= CurrentStepDecision %>	Gets decision that was made at the previous step.
<%= InboxPackageDeepLinkUrl %>	A deep link that points directly to the package in the Inbox.
<%= Input [SelectedFieldInputID] %>	A data field related to the package of the document. Replace the variable SelectedFieldInputID with either a selected input field (green field) from a Central...
<%= PackageName %>	The name of the package.
<%= PreviousStepActionWithActor %>	The action that was made at the previous step with the name of the actor who made the action.
<%= PreviousStepActor %>	The actor who previously made an action on the package.

Email template keys can be filtered/searched by utilizing the search bar in the upper right-hand corner of the Email Template Keys Help section.

EMAIL TEMPLATE KEYS HELP		CLOSE
Click on the key to copy to the clipboard		current
EMAIL TEMPLATE KEY	DESCRIPTION	
<%= CurrentStepActor %>	The actor who currently made an action on the package.	
<%= CurrentStepComment %>	The comment that was made for the package at the current step.	
<%= CurrentStepDecision %>	Gets decision that was made at the previous step.	

Email Template and searching for Template Keys

Additionally, input data coming from Forms or Documents that have been integrated in a workflow can also be added as part of the email body. Use the following key to insert an input:

<%= Input {SelectedFieldInputID} %>

The user must replace "SelectedFieldInputID" with the input ID that should be displayed in the email body.

Note: Be aware that the input fields on the email body must match the input fields integrated in the workflow where the template is used to send a step notification.

Email template keys which produce a link are used to provide a URL to the form within the email body. For example, the "<%= Esign %>" email template key will produce a URL for a Signer Recipient who does not have an internal account in order for that person to sign a form.

EMAIL TEMPLATE KEYS HELP		CLOSE
Click on the key to copy to the clipboard		link
EMAIL TEMPLATE KEY	DESCRIPTION	
<%= ActivityPackageDeepLinkUrl %>	A deep link that points directly to the package in the user's activity.	
<%= Esign %>	A link that points to a form to sign and view electronically.	
<%= InboxPackageDeepLinkUrl %>	A deep link that points directly to the package in the Inbox.	

The data keys are displayed with a different color in the email body to highlight and differentiate them from the regular text. If a data key is not displayed with a different color, the key syntax might be wrong. Data keys start with '<%= ' and end with '%>'.

Name	TaskQueuePastDueNoticeNonPersonActor - Copy
Subject	Package is Overdue
Body	The workflow package '<%= PackageName %>' has been in your inbox for <%= CurrentStepTime %>. Please act on this package as soon as possible. This package is currently assigned to '<%= CurrentActor %>' and is <%= LockedStatusWithActor %>. It can be accessed by using the following link: <%= InboxPackageDeepLinkUrl %>

Email Template Example with Data Keys

Delete an Email Template

In order to delete an email template, the administrator must first navigate to the list of email templates. Then, selecting “Edit” in the upper right-hand corner of the page (next to the Search) will produce checkboxes next to each template. The administrator can then select the templates that need to be deleted and select “Delete” in the upper right-hand corner of the page. A confirmation message will appear asking the user to confirm the deletion(s).

Delete Templates?

Are you sure you want to delete the selected Templates?

CONFIRM
CANCEL

Delete Email Template warning

In order to exit “Edit” mode, simply select “Cancel” on the top right-hand corner of the page.

NOTE | Email templates that are used in a workflow notification and default templates for E-Sign cannot be deleted. An error message will be displayed when a template delete action cannot be completed successfully due to the reference restriction.

Using Email Template in Notify Setting

Inside a workflow, in the Workflow Designer, the administrator can select which Email Template to use for notification. All email templates are valid options on the Email Template and Originator Email Template drop-downs.

Group Actor Configuration

Properties

Notify

Filter By

Reminders

User Directed Routing

Active Packages

Email Members

Email Template

Choose One...

Dynamic Email Recipient

Recipient's Email

Email address of the intended recipient

Originator Email Template

None

SAVE

CANCEL

Group Actor Configuration with option to select Email Template

Markdown Language in Email Body

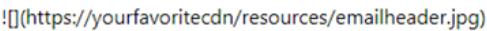
The email template's body supports basic markdown syntax to enhance the notifications sent by the flow steps. Some of the supported markdown features are listed below:

	Markdown	Example
1	Set html headings by using # before a text # heading level 1 ## heading level 2 ### heading level 3 #### heading level 4	#Important Email Important Email
2	Make the text bold by adding two asterisks before and after the text you want to bold Text	In this line this is my bold text In this line this is my bold text
3	Make the text italic by adding an asterisk before and after the text you want to make it italic <i>Text</i>	In this line this is my <i>italic text</i> In this line this is my <i>italic text</i> In this line this is my <i>bold italic text</i> In this line this is my <i>bold italic text</i>
4	To create a blockquote, add a > in front of the paragraph. > Paragraph	This is a blockquote line This is a blockquote line
5	Display an image using the following syntax (image URL) We recommend you have the images available for public access from a Content management system or web site.	 The image will be rendered in the email, see example in the Figure 10 Email created using markdown

Email Template Example with Markdown and Keys

The following images show how email template keys and markdown syntax can be utilized to customize email customizations for the notifications.

Body



Dear Student,

We have the honor to invite you to become a member of the Student Council of SU. Your engagement is important to us and the student community.

> ***"A Student Council provides an opportunity for students to engage in a structured partnership with teachers, parents, and school managers in the operation of their school. Research indicates that Student Councils can improve academic standards and reduce dropout rates in schools. Student Councils can create a sense of ownership of the school and its activities among the student population."***

We hope you accept this invitation and allow us to become part of your growth in this institution.

To accept or decline please fill in this [form].

[form]: <%= ActivityPackageDeepLinkUrl %>

<%= CurrentStepActor %> </br>

SU Student Council </br>

First Row Drive </br>

Redmond WA 98000, USA

Email Template Example with Markdown and Template Keys



Dear Student,

We have the honor to invite you to become a member of the Student Council of SU. Your engagement is important to us and the student community.

"A Student Council provides an opportunity for students to engage in a structured partnership with teachers, parents, and school managers in the operation of their school. Research indicates that Student Councils can improve academic standards and reduce dropout rates in schools. Student Councils can create a sense of ownership of the school and its activities among the student population."

We hope you accept this invitation and allow us to become part of your growth in this institution.

To accept or decline please fill in this [form](#).

Dan Smith
SU Student Council
First Row Drive
Redmond WA 98000, USA

Result of Email Template with Markdown and Template Keys

Unique Notification Subject Lines Using Email Template Keys

IMPORTANT TO NOTE: There are instances where emails may be grouped together when the conversation view setting is turned on within your email service provider.

Emails are grouped if each message meets the following criteria:

- The same recipients, senders, or subject as a previous message

- A reference header with the same IDs as a previous message
- Sent within one week of a previous message

To prevent grouped emails:

- Create a new subject for each message that you don't want to group.
- Send each message with a unique reference header value that doesn't match a previous message.