

# Emails and Templates Guide

How to create and edit templates

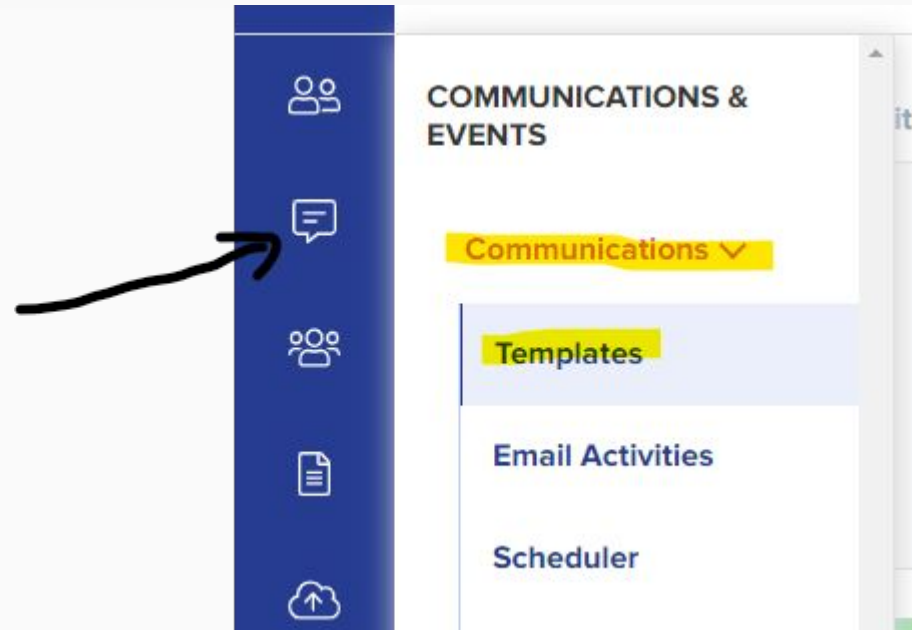


# How to access your email templates

By default, there are some preset templates stored on your system

Access them here:

Communications & Events >  
Communications > Templates



# How to edit an existing template (1)

You will find templates within your School Communications and System Communications areas

You can edit an existing template by clicking the pencil (edit) icon on the right-hand side of the table

## Communications Templates

School Communications 1

System Communications 1

All Templates

Emails

Notifications

SMS 1

Favorites

School Communications > All Templates

Search in table













Set default email

Find and Replace

+ Add New

Email Template Design

Send Test

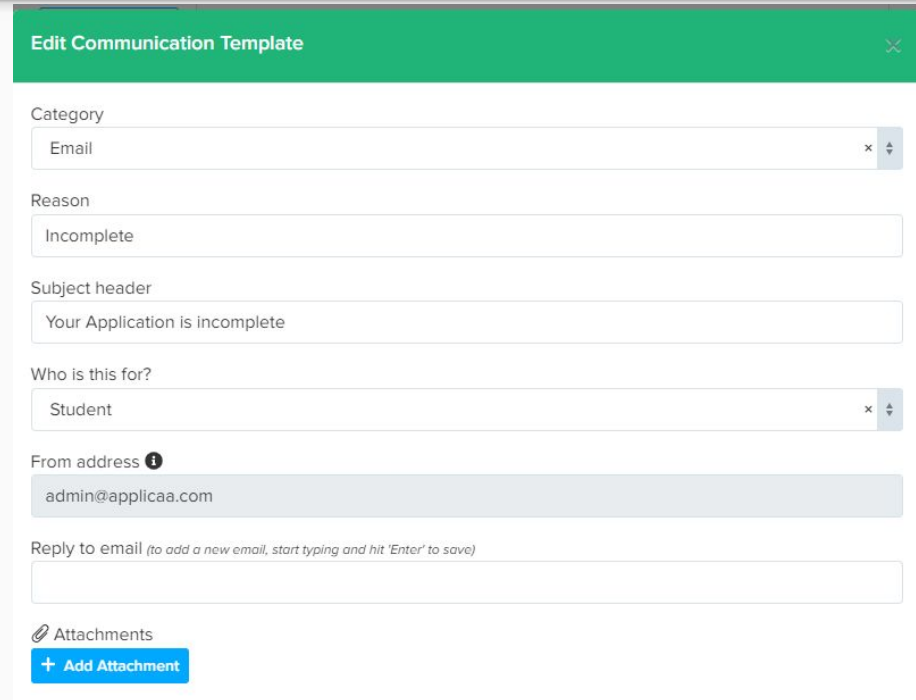
	Subject	Purpose	Type	Last Updated	Times Used	Actions
★	Fast track - enrolment	Invited Pending Grades Fast Track - Internal	✉	05/06/2020	0	   
★	Alternative Provision	Does not meet entry requirements	✉	05/06/2020	0	   
★	Offer Withdrawn Notice from Green Abbey School	Withdraw Offer	✉	05/06/2020	0	   

# How to edit an existing template (2)

You will see the email processor, where you can edit your information and add attachments ahead of customising the body of the email

Reason - this is an internal setting for your use (helps you identify the purpose of your template)

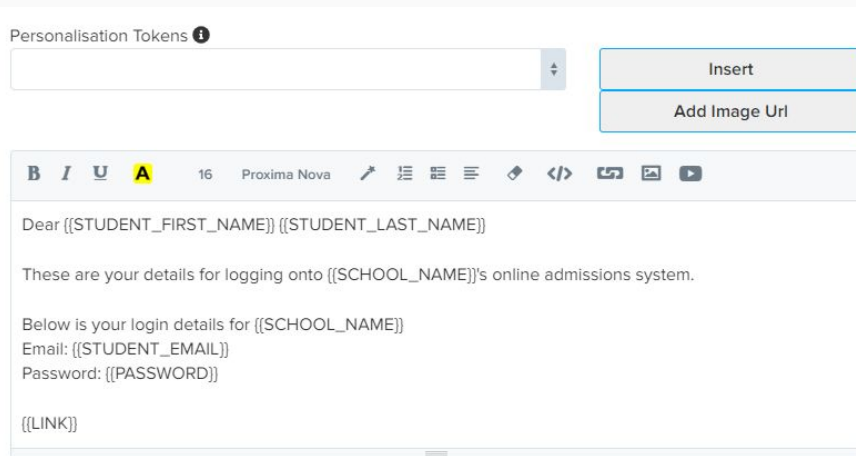
Subject Header - this is the subject line which your recipient will see



The screenshot displays the 'Edit Communication Template' interface. It features a green header bar with the title 'Edit Communication Template' and a close button. Below the header, there are several input fields: 'Category' (set to 'Email'), 'Reason' (set to 'Incomplete'), 'Subject header' (set to 'Your Application is incomplete'), and 'Who is this for?' (set to 'Student'). The 'From address' field is set to 'admin@applicaa.com' and includes an information icon. The 'Reply to email' field is empty and has a note: '(to add a new email, start typing and hit 'Enter' to save)'. At the bottom, there is an 'Attachments' section with a blue '+ Add Attachment' button.

# How to edit an existing template (3)

You can then amend the existing message in the body of your email template by typing directly into the box, or copying and pasting from another source



The screenshot shows a user interface for editing an email template. At the top, there is a section titled "Personalisation Tokens" with a dropdown menu and two buttons: "Insert" and "Add Image Url". Below this is a rich text editor with a toolbar containing icons for bold, italic, underline, text color, font size (16), font family (Proxima Nova), and other formatting options. The main text area contains the following content:

Dear {{STUDENT\_FIRST\_NAME}} {{STUDENT\_LAST\_NAME}}

These are your details for logging onto {{SCHOOL\_NAME}}'s online admissions system.

Below is your login details for {{SCHOOL\_NAME}}

Email: {{STUDENT\_EMAIL}}

Password: {{PASSWORD}}

{{LINK}}

Characters which appear in `{{THIS_FORMAT}}` are called personalisation tokens. They work like a mail merge and allow you to make your emails personalised. You can add them in by selecting them from the dropdown menu and pressing "insert"

# How to edit an existing template (4)

Remember to press **SAVE** once you have made your changes

You can then send yourself a test email to check everything looks OK before you send it to your applicants - useful for checking formatting and spelling!

Click “update and send test” and then choose (a) who to send the test to *and* (b) a specific user for your preview.

\*The user you select will not receive the test email; the function just allows you to see how the email would look to them (so you can check the personalisations etc are working)

# How to edit an existing template (4a)

**Update And Send Test** **Save Template**

Make sure your email hits all the right notes. Send a test version to yourself or a colleague. Test emails are sent from admin@applicaa.com

Choose one or more recipients

mat\_user@applicaa.com ×

receive email as specific contact ⓘ

John Doe (john.doe@admp.uk) - Student ×

**Update And Send Test**

# Creating a new template

In your School Communications area you can create new templates, which you can then set up in the same way as outlined in the previous slides:

The screenshot displays the 'Communications Templates' interface. At the top, there are navigation tabs: 'Templates', 'Email Activities', 'Scheduler', and 'Communication Summary'. Below this, the 'School Communications' tab is selected and highlighted in yellow. The interface shows a table of templates with columns for Subject, Purpose, Type, Last Used, and Actions. A 'Set default email' button is visible above the table. A 'Search in table' input field is located above the table. A 'Set default email' button, 'Find and Replace' button, and a highlighted '+ Add New' button are visible above the table. A dropdown menu is open under the '+ Add New' button, showing options like 'Add new template' and 'Add new folder'. The table contains one visible row for 'Fast track - enrolment'.

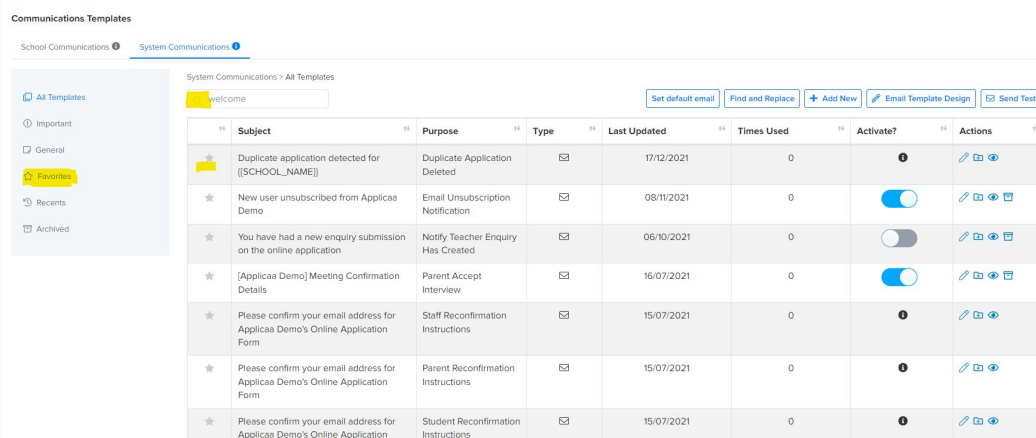
Subject	Purpose	Type	Last Used	Times Used	Actions
★ Fast track - enrolment	Invited Pending Grades Fast Track - Internal	✉	05/06/2020	0	



# Finding emails quickly

You can mark templates as “favourites” using the star column on the left of the table

You can also do a keyword search in the search bar at the top



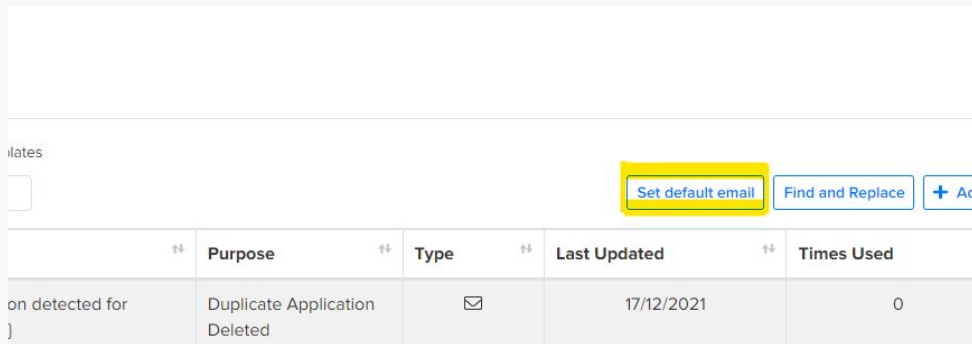
The screenshot shows the 'Communications Templates' interface. At the top, there is a search bar with the text 'welcome' and buttons for 'Set default email', 'Find and Replace', '+ Add New', 'Email Template Design', and 'Send Test'. Below the search bar is a table of templates. The table has columns for Subject, Purpose, Type, Last Updated, Times Used, Activate?, and Actions. The 'Activate?' column contains toggle switches. The 'Actions' column contains icons for edit, view, and delete. A star icon in the left margin of the first row indicates it is a favorite. The left sidebar shows a navigation menu with 'All Templates', 'Important', 'General', 'Favorites', 'Recents', and 'Archived'. The 'Favorites' option is highlighted.

Subject	Purpose	Type	Last Updated	Times Used	Activate?	Actions
Duplicate application detected for [SCHOOL_NAME]	Duplicate Application Deleted	✉	17/12/2021	0	🔴	✎ 👁 🗑
New user unsubscribed from Applica Demo	Email Unsubscription Notification	✉	08/11/2021	0	🟢	✎ 👁 🗑
You have had a new enquiry submission on the online application	Notify Teacher Enquiry Has Created	✉	06/10/2021	0	🔴	✎ 👁 🗑
[Applica Demo] Meeting Confirmation Details	Parent Accept Interview	✉	16/07/2021	0	🟢	✎ 👁 🗑
Please confirm your email address for Applica Demo's Online Application Form	Staff Reconfirmation Instructions	✉	15/07/2021	0	🔴	✎ 👁 🗑
Please confirm your email address for Applica Demo's Online Application Form	Parent Reconfirmation Instructions	✉	15/07/2021	0	🔴	✎ 👁 🗑
Please confirm your email address for Applica Demo's Online Application	Student Reconfirmation Instructions	✉	15/07/2021	0	🔴	✎ 👁 🗑

# Setting your “from” address

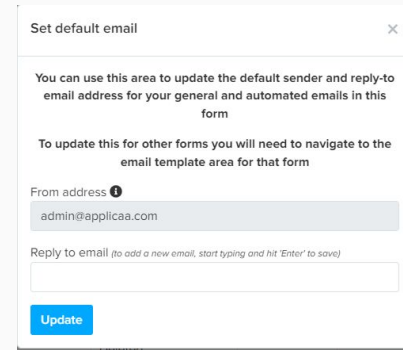
By default, your system sends emails to applicants from [“admin@appliance.com”](mailto:admin@appliance.com)

You can change this by clicking “set default email” and then clicking the “i” next to From Address and following the instructions



The screenshot shows a table with columns: Purpose, Type, Last Updated, and Times Used. A row is visible with the text 'on detected for Deleted', an envelope icon, the date '17/12/2021', and the number '0'. Above the table, there are three buttons: 'Set default email' (highlighted in yellow), 'Find and Replace', and '+ Add'.

	Purpose	Type	Last Updated	Times Used
on detected for Deleted	Duplicate Application Deleted	✉	17/12/2021	0



The screenshot shows a dialog box titled 'Set default email'. It contains the following text: 'You can use this area to update the default sender and reply-to email address for your general and automated emails in this form'. Below this, it says: 'To update this for other forms you will need to navigate to the email template area for that form'. There are two input fields: 'From address' (with an information icon) containing 'admin@appliance.com', and 'Reply to email (to add a new email, start typing and hit 'Enter' to save)'. An 'Update' button is at the bottom.

Set default email

You can use this area to update the default sender and reply-to email address for your general and automated emails in this form

To update this for other forms you will need to navigate to the email template area for that form

From address ⓘ  
admin@appliance.com

Reply to email (to add a new email, start typing and hit 'Enter' to save)

Update

# Sending an email to an applicant or group (1)

If you are emailing a single applicant/contact, you could load their profile and click “email”

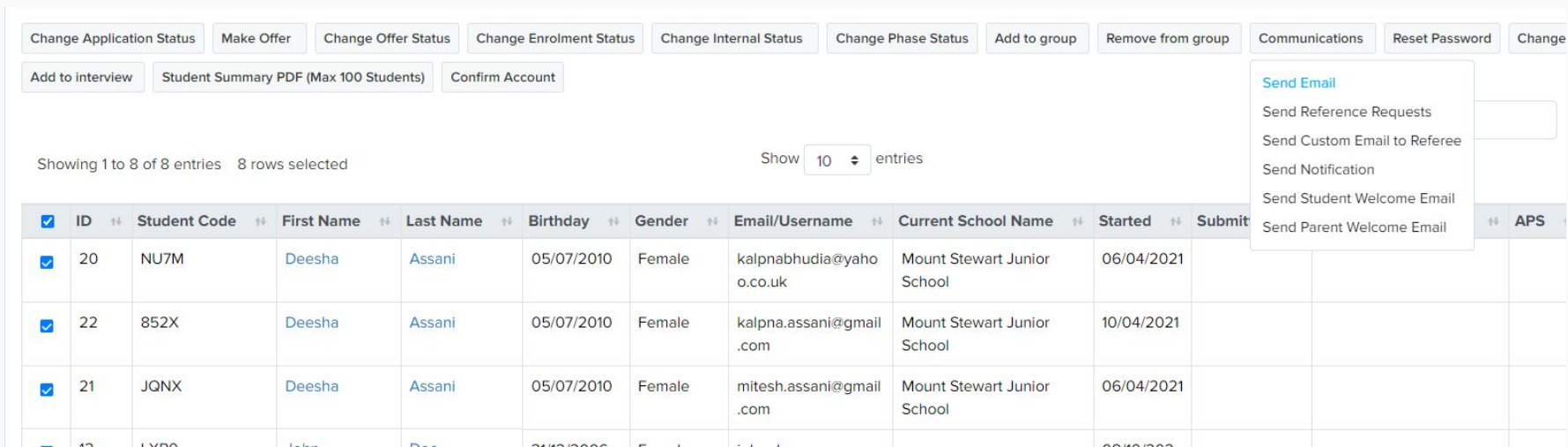
The screenshot shows a user profile page with the following elements:

- Header: "ool and Nursery -" and "loud.com"
- Enrolment Status: Pending
- Information: Only available to change if the student application status is completed
- More actions section with a help icon (i):
  - Buttons: Add to group, Remove from group, Add to an interview, Change Application Form
  - Buttons: Reset Password, Send Notification, Print, **Email** (highlighted in yellow), Impersonate, Communication Log
  - Buttons: Delete, Convert to Parent Account, Confirm This Account, Merge

You can also click on their Communication Log to see what you have sent to them in the past

# Sending an email to an applicant or group (2)

If you are emailing a group, you can email them in bulk by loading a group from your dashboard and then selecting the applicants in the list, before clicking “communications” and “send email”



The screenshot shows a dashboard with various action buttons at the top: Change Application Status, Make Offer, Change Offer Status, Change Enrolment Status, Change Internal Status, Change Phase Status, Add to group, Remove from group, Communications, Reset Password, and Change. Below these are buttons for Add to interview, Student Summary PDF (Max 100 Students), and Confirm Account. A table displays a list of applicants with columns for ID, Student Code, First Name, Last Name, Birthday, Gender, Email/Username, Current School Name, Started, and Submit. Three rows are visible, each with a checked checkbox in the ID column. A dropdown menu is open over the 'Communications' button, listing options: Send Email, Send Reference Requests, Send Custom Email to Referee, Send Notification, Send Student Welcome Email, and Send Parent Welcome Email. The 'Send Email' option is highlighted in blue.

Showing 1 to 8 of 8 entries 8 rows selected

Show 10 entries

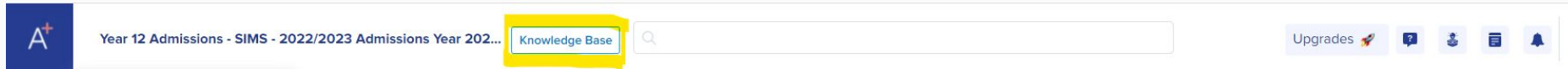
<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username	Current School Name	Started	Submit	APS
<input checked="" type="checkbox"/>	20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo.co.uk	Mount Stewart Junior School	06/04/2021		
<input checked="" type="checkbox"/>	22	852X	Deesha	Assani	05/07/2010	Female	kalpna.assani@gmail.com	Mount Stewart Junior School	10/04/2021		
<input checked="" type="checkbox"/>	21	JQNX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail.com	Mount Stewart Junior School	06/04/2021		
<input type="checkbox"/>	12	LXDP	John	Das	21/02/2006	Female	john.das@gmail.com	Mount Stewart Junior School	02/10/2021		

# Where to look for further guides and information

As an Admissions+ user, you have access to our Knowledge Base

This is regularly updated with new content, from webinars and videos to PDF guides on all aspects of the system

You'll find the link to the Knowledge Base at the top of your Admissions+ page:



Here is the direct link to the Communications & Events section:  
<https://helpdesk.applicaa.com/communications-events>