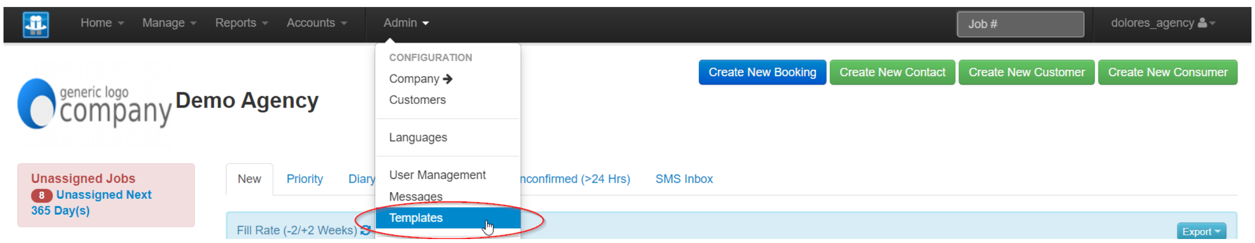
Templates

As we discussed in the **Notifications** document, when we manage **Bookings** in Interpreter Intelligence, such as offering, assigning, confirming, updating etc., the system will send corresponding notifications to the relevant roles/users on the **Booking**. **Templates** control the content and layout of such notifications.

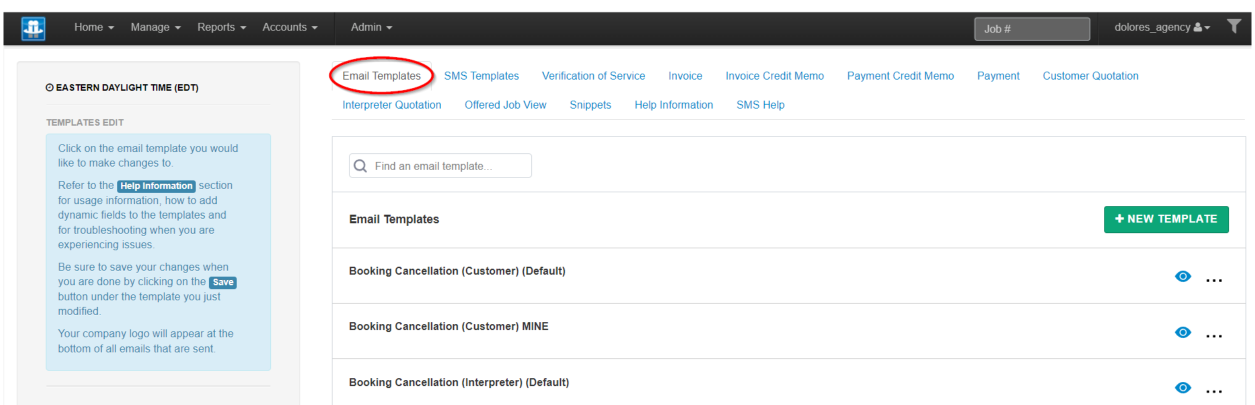
When you first get access to your Interpreter Intelligence site, default **Templates** will be fully enabled for your agency therefore you do not have to do anything. However, if you wish to modify the content or the layout of any of the system notifications you can do this in **Templates**.

To access Templates, go to the **'Admin'** menu and click **'Templates'**.

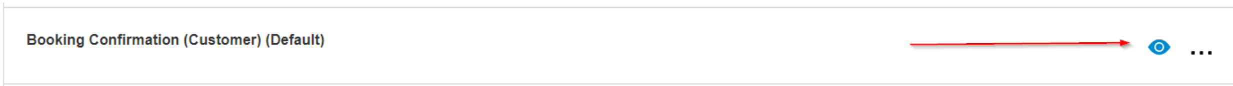


Default Email Templates

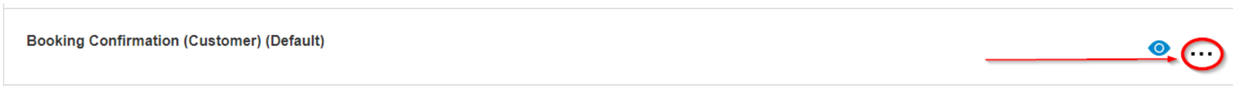
On the **Email Templates** tab you will see a list of all Default templates that are pre populated on your II system corresponding to all notifications that may be sent at some point in time by the system. You can scroll through the list or you can use the Search bar to find a specific template. Default Templates are defined by "(Default)" at the end of the Template name providing that the name of the Template has not been modified. Additional templates created by you would not have this markation, more on this later.



You can **Preview** any of these templates by clicking on the corresponding blue eye icon. This will display a sample email (for a random Job on your system) as it would appear in an actual email to the Recipient.



You can modify any of these templates by clicking on the corresponding ellipsis.



On the **General** tab you will have access to the **Name** of the template, the **Subject** of the email (as it will appear when received) and the **Template Body**. You can customise the **Subject** and the **Template Body** using free text or Snippets (more information below).

On the **Advanced** tab you will have access to the Digest box; using a Digest format for an email template means that when a bulk action is taken (such as Bulk **Offer**) the Interpreter would receive a single email listing all of the individual Jobs that they have been **Offered**. The Digest box allows you to customise the contents of the Digest email.

On the **Help Information** tab you will have access to how to add dynamic information to your templates, this is what we call **Snippets**.

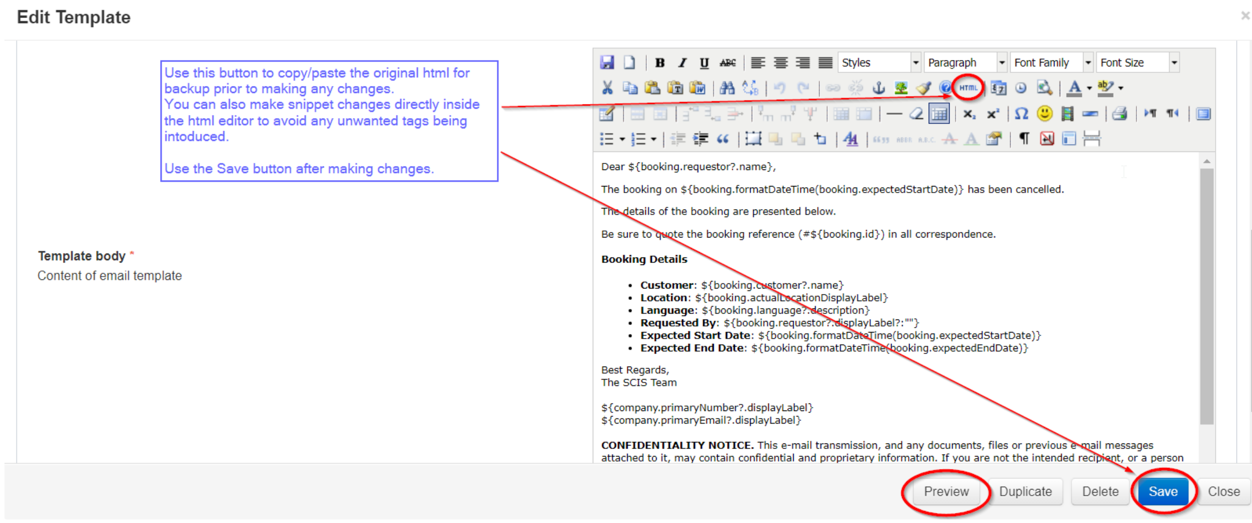
Snippets
All information inside curly brackets ({ }) are what we call snippets. A snippet is a dynamic field which means that when an email is generated for a specific **Job**, it will pull the appropriate values for that **Job**. For example, ${booking?.customer?.name} will pull the name of the **Customer** on the respective **Job** and populate the corresponding email notification with that **Customer** name.

Modifying Templates
Before making any changes we recommend making a backup copy of the current template content. To do this:

- Click on the 3 horizontal dots next to the template that you wish to edit
- On the **General** tab, scroll down to the **Template Body** section
- Click on the **HTML** button on the editing toolbar, select all of the text in the window and copy/paste this into a Notepad* (or other text editor) and save in a secure location.

*We recommend using Notepad or another plain text editor rather than a word processing editor such as MS Word as this can add html formatting which could corrupt the template if this text is copied back in.
Similarly, if you have produced a mock-up of your template in a word editor outside of II, it is not recommended that this content is pasted from the Word editor directly into the **Template**.

After making any changes to a **Template** you can save it using the blue **Save** button.



You can then **Preview** the template by clicking on the Preview button or by using the corresponding blue eye icon if you have Closed the template. This will display a sample email (for a random Job on your system) as it would appear in an actual email to the Recipient. If there are any errors (e.g. html tags) this will generate an error message when previewing the template. Please contact support@interpreterintelligence.com if this happens.

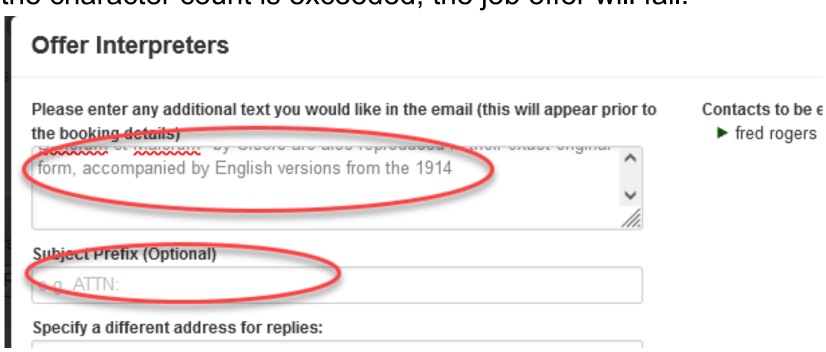
Modifying Templates - an example

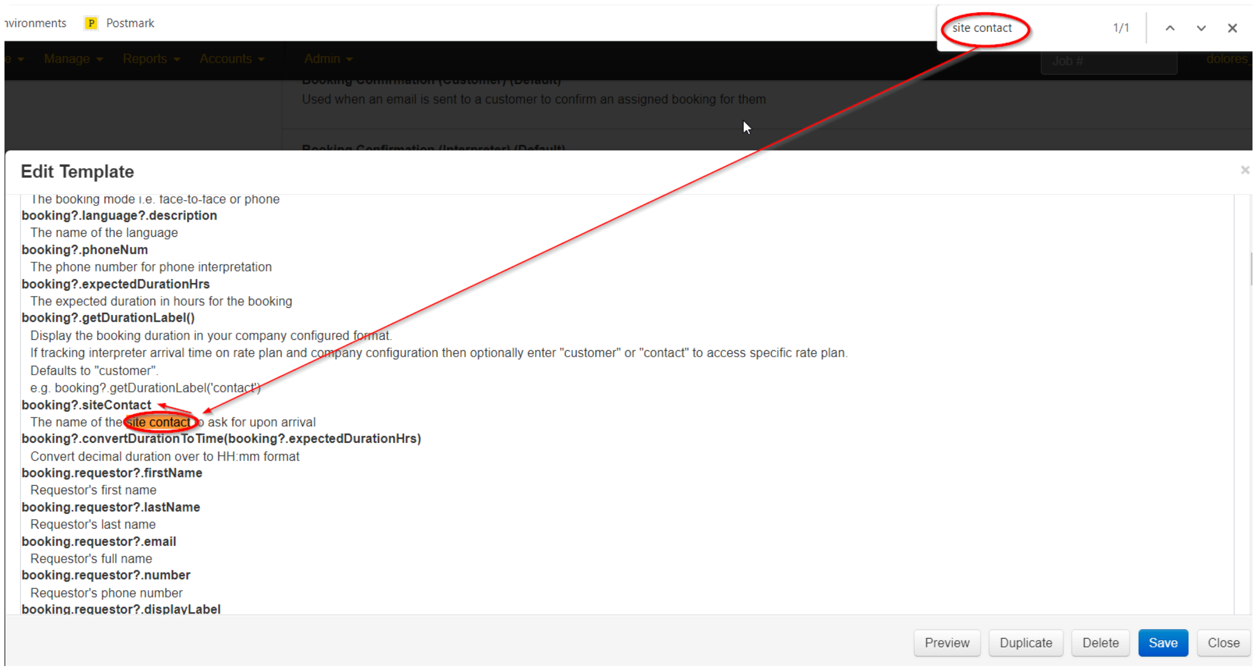
Let's take a look at a simple example of a modification to an email **Template**. Let's say we would like to add a site contact to the **Booking Confirmation** for **Interpreters**.

- ➔ Navigate to the **'Admin'** menu and select **'Templates'**
- ➔ Search for or scroll down to the **Booking Confirmation (Interpreter) (Default)** template
- ➔ Click on the 3 horizontal dots to edit
- ➔ Click on the **Help Information** tab
- ➔ On your keyboard press Ctrl + F keys and type "site contact" to search for the relevant snippet
- ➔ This will locate the site contact snippet which you can highlight and copy - **booking?.siteContact**

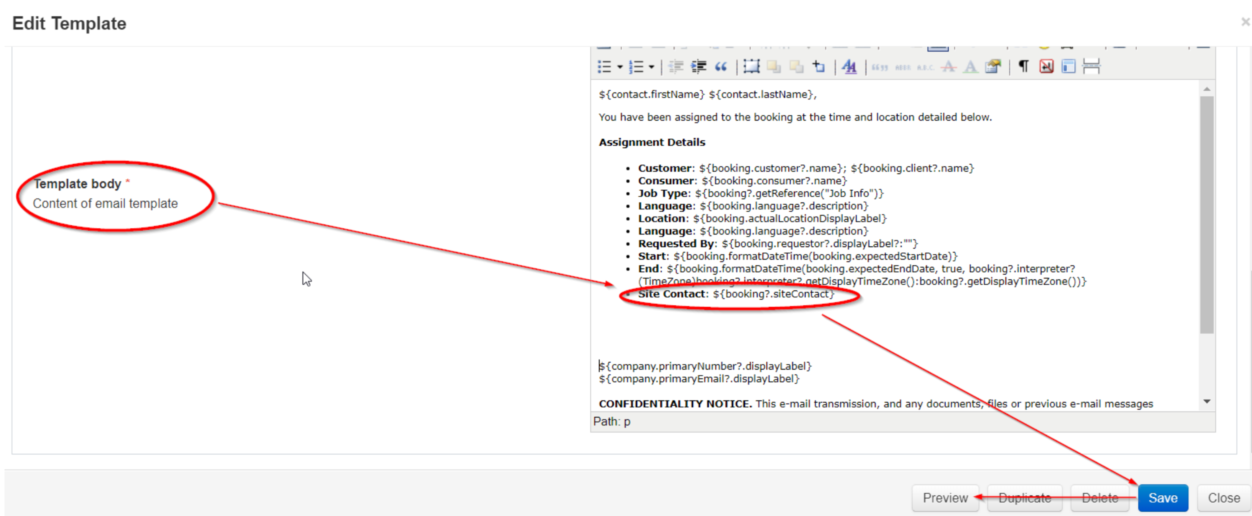
Message field - Character count maximum

In some cases, additional information can be entered ad-hoc to display in an email. For example, when offering jobs by email via the **Assign Interpreter** page, there is a field to enter a message. This field has a 256-character count limit, as does the Subject Prefix field below it. If the character count is exceeded, the job offer will fail.





- ➔ Click on the **General** tab
- ➔ Scroll down to the **Template Body** section
- ➔ Then simply create a bullet point for "Site Contact" or whatever you wish to title this, you may want to format this in Bold like the existing bullets, and then simply paste the snippet that you just copied
  - ◆ Remember that all snippets must be preceded by a $ (dollar sign) and surrounded by {} (curly brackets) - you can copy these symbols from existing bullets
- ➔ Finally, **Save** and **Preview** the template



If you receive any errors when previewing a template this is likely due to invalid formatting on a snippet or a stray html tag and this means that such emails will fail to send. To fix this you can remove the most recent changes or, delete all content from the html window and paste your backup copy into the html window and save the template or contact us at support@interpreterintelligence.com.

Digest Notifications

You can enable certain **Templates** for Digest, this means that, when a bulk action is taken (such as Bulk **Offer** or **Confirmation**), only one email will be sent with the details of all relevant **Jobs** within the Bulk action, rather than a single email for each **Job** which can cause an influx of email for the recipient.

For example, if you Bulk **Offer** Jobs from the **Manage Jobs** page using the **Bulk Action** button, and you have enabled Digest on your **Booking Request** template, any Interpreter who has been **Offered** multiple **Jobs** will receive a single email with all of the **Job Offers** listed within that email, rather than a single email for each **Job Offer**.

The Digest option is particularly useful for **Booking Request** to **Interpreters** and **Confirmations** to **Customers** and/or **Interpreters**.

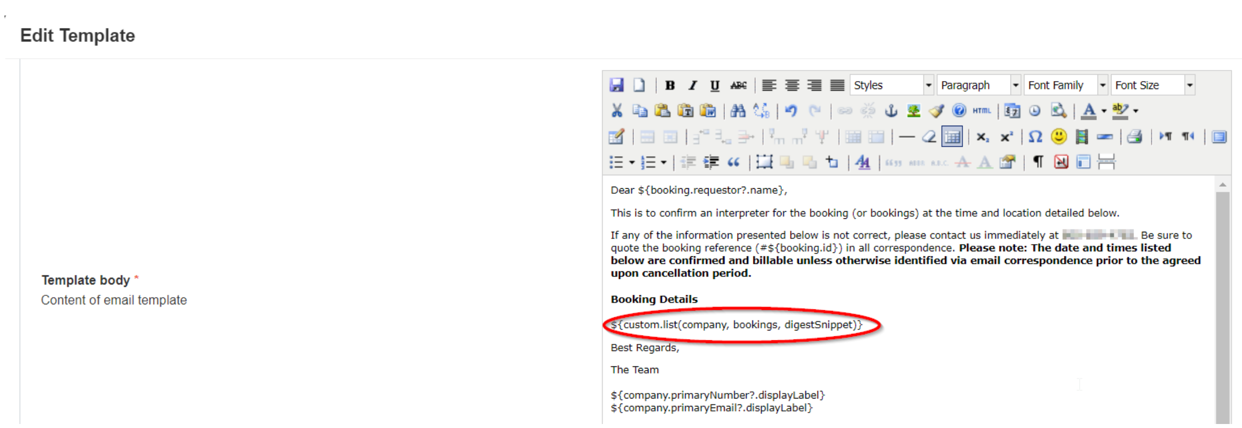
You will notice also that some **Templates**, such as Reminders, e.g. **Booking Upcoming Reminder (Interpreter)** are set to Digest by Default as these types of emails will usually relate to multiple J**obs**.

To use the Digest option within a **Template**, replace the bulleted list of **Booking Details** with the following snippet:

${custom.list(company, bookings, digestSnippet)}

The exception to this is you must use the following snippet for the **Booking Request Template**:

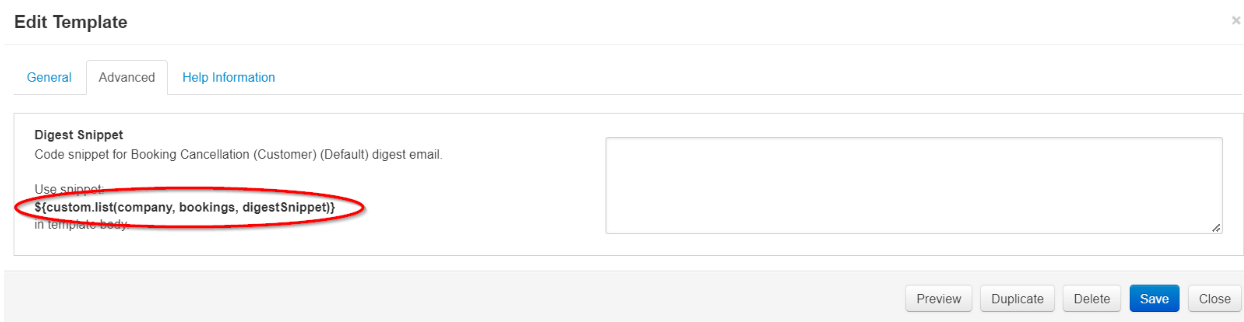
${custom.list(company, contact, jobOffers)}



Save the Template and you can then **Preview**.

On the **Advanced** tab you can also use the Digest snippet box to customise the **Booking** details that will appear in the email for each Job. Please contact us at support@interpreterintelligence.com for help with this.

You will also have access to the Digest snippet that should be used in the **Template** Body.



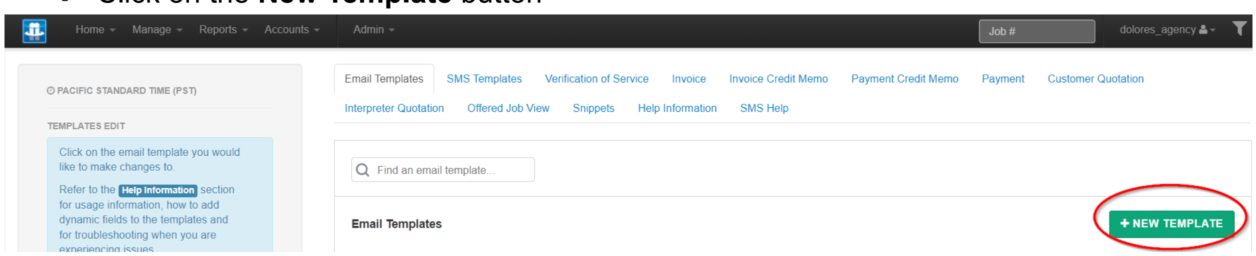
Creating New Templates

Aside from the **Default Templates** that are available in II and that will service all of your email needs, you can also create new **Templates**. For example, you may wish to customise a **Booking Confirmation** for a specific **Customer**. When new **Templates** are created, they will need to be then set at a **Company** or a **Customer** level to replace the **Default Template(s)** and this will be covered in later sections.

First, let's look at 2 ways that you can create a new **Template**.

Creating a New Template from scratch

➔ Navigate to the **'Admin'** menu and select **'Templates'**
➔ Click on the **New Template** button



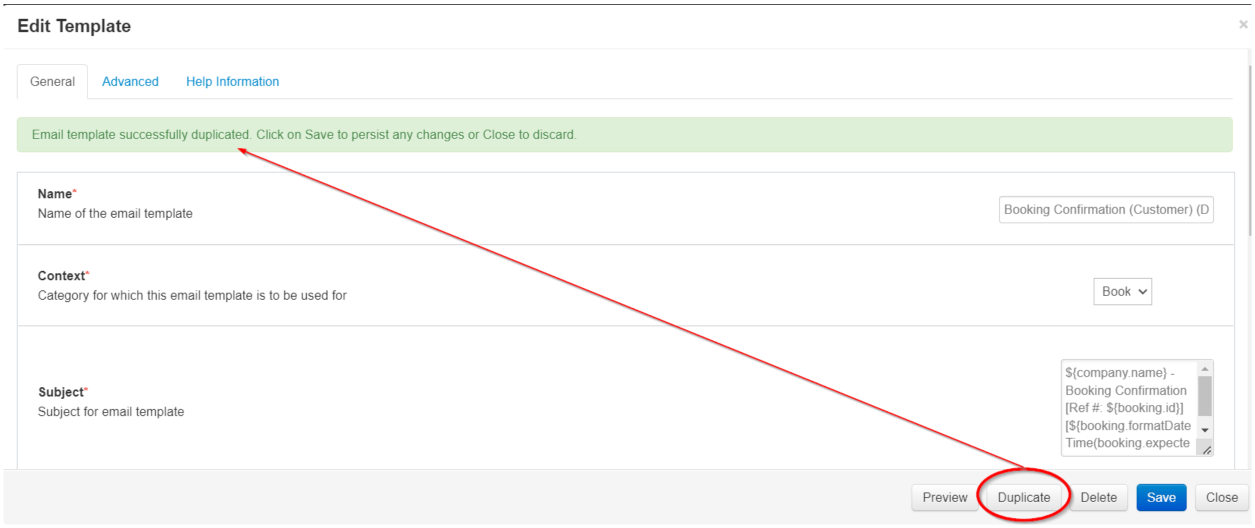
➔ This will open a new blank **Template**
➔ On the **General** Tab:
  ◆ Provide a unique **Name** for the **Template**
  ◆ Select the **Context** (usually **Booking**)
  ◆ Enter a **Subject**, you can use snippets also, such as Job ID for e.g.
  ◆ You can then enter any text you wish into the **Template Body**, this can be free text but, for any **Job** details/variables, use the Help Information tab to find the appropriate snippet
  ◆ Finally, **Save** and **Preview** the template
➔ On the **Advanced** tab you can enable/modify the **Template** for Digest if you wish, see the section on **Digest Notifications.**

Duplicating an existing template

Rather than creating a **New Template** from scratch you can **Duplicate** an existing one and then make any required modifications to the new/duplicate **Template**.

➔ Navigate to the **'Admin'** menu and select **'Templates'**
➔ Search for or scroll down to the template that you wish to **Duplicate**
➔ Click on the 3 horizontal dots to open/edit the template

→ Click the Duplicate button



→ As per **Creating a New Template from scratch,** on the **General** Tab:
- ◆ You must provide a unique **Name** for the **Template**
- ◆ Modify the **Subject** if required, you can use snippets also, such as Job ID for e.g.
- ◆ You can then modify the **Template Body** as you wish by adding/removing free text and snippets
- ◆ Finally, **Save** and **Preview** the template

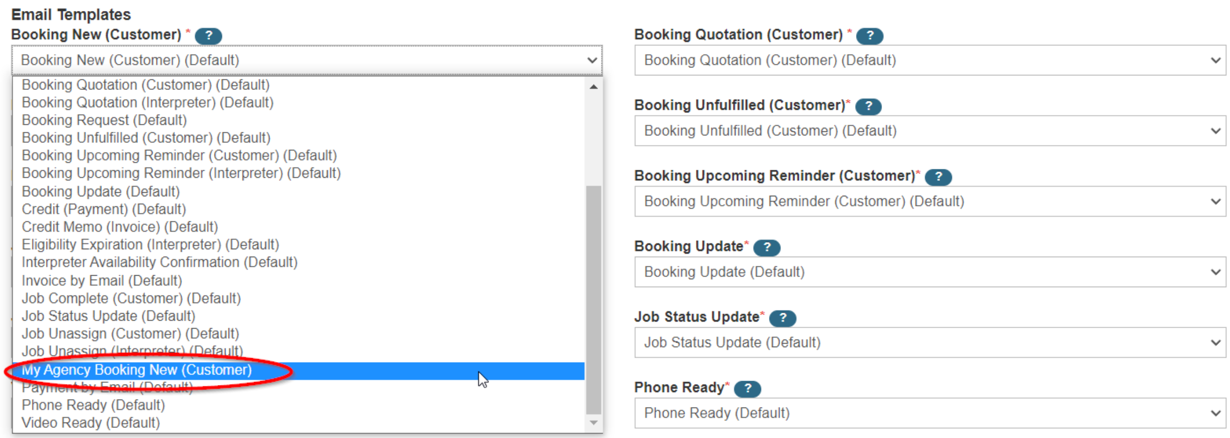
→ On the **Advanced** tab you can enable/modify the **Template** for Digest if you wish, see the section on **Digest Notifications.**

Assigning New Templates at a Company level

Now that you have created **New Templates** (either from scratch or by duplicating) you will likely want to replace a **Default Template** with a newly created **Template** so that the new **Template** is picked up for the corresponding automatic notification.

Let's look firstly at how to do this at a Company level, this means that for all relevant emails (regardless of **Customer**) the corresponding assigned **Template** will be used.

→ Navigate to the **'Admin'** menu and select **'Company'**, click on the **Notifications** tab
→ Scroll down to the **Email Templates** section at the end of the page
→ You will see a list of all **Templates** that are automatically used by the system and their corresponding template assignments
→ If you have not changed any **Template** names or assignments, all of these will have **"Default"** in the name which means that they are using the default (out-of-the box) **Templates**
→ In this example, let's change the **Booking New (Customer) Template**, click on the dropdown menu for that Template and let's select **My Agency Booking New (Customer)** which I created and customised to my liking

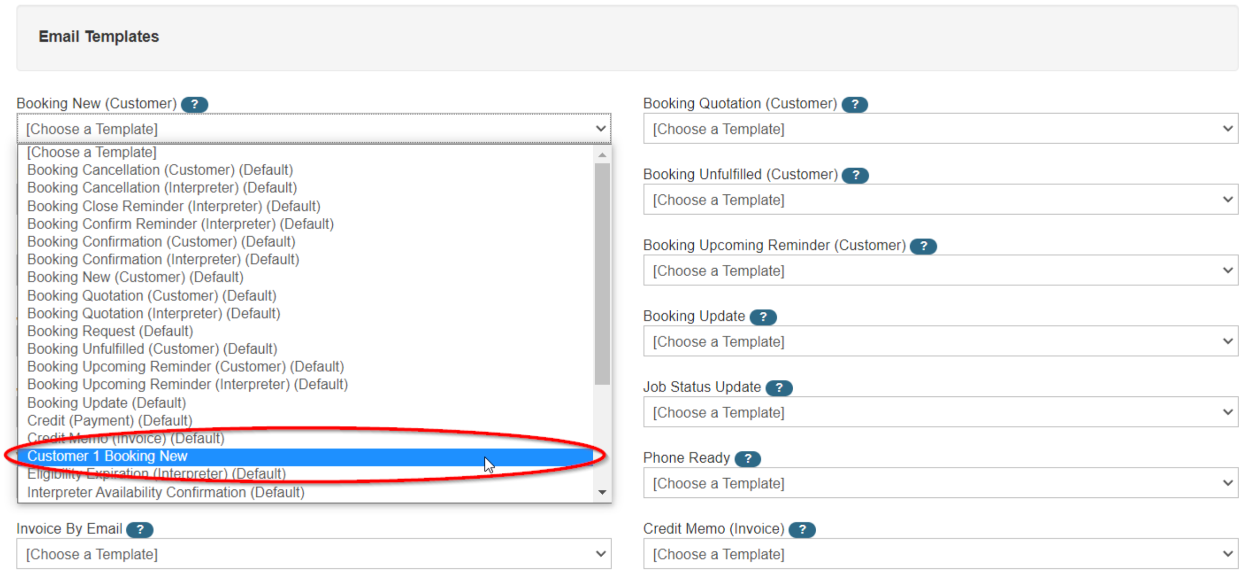


- ➔ Then simply click the blue **Save** button on the top left of the page
- ➔ From now on, the **My Agency Booking New (Customer) Template** will be used for all emails sent when a new **Booking** is created
- ➔ You can repeat the above steps at any time if you wish to revert to the default or another new **Template**
- ➔ Just remember, if you do need to make content changes **(Admin -> Templates)** to a **Template** you should first check which **Template** is in use so that you are assured that you are editing the correct **Template**

Assigning New Templates at a Customer level

The real advantage behind creating **New Templates** is that you can have an entirely different **Template** for different **Customers** as you can assign individual **Templates** at the **Customer** level, thereby overriding the **Template** in use at the Company level.

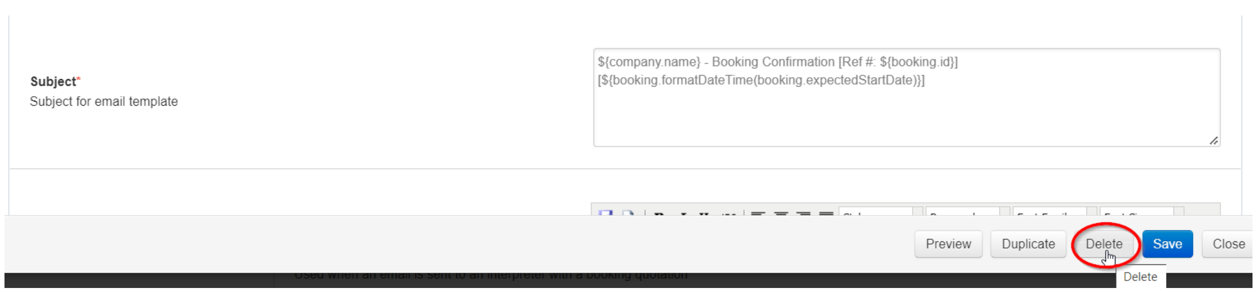
- ➔ Navigate to the **'Admin'** menu and select **'Customers'**, click on the **Notifications** tab
- ➔ Search for and select the customer in the list on the left hand side
- ➔ Scroll down to the **Email Templates** section at the end of the page
- ➔ You will notice that there are less **Templates** listed here as we are only concerned with **Templates** that are used for emails to **Customers**
- ➔ You will notice also that if you have not previously assigned a **Template** to a **Customer** that the value will be empty **[Choose a Template]**, this is to indicate that there is no **Customer Template** override and that the Company level template is in use
- ➔ In this example, let's again change the **Booking New (Customer) Template**, click on the dropdown menu for that Template and let's select **Customer 1 Booking New** which I created and customised to my liking



- ➔ Then simply click the blue **Save Changes** button on the top left of the page
- ➔ From now on, the **Customer 1 Booking New Template** will be used for all emails sent when a new **Booking** is created for this particular **Customer**
- ➔ You can repeat the above steps at any time if you wish to revert to another new **Template**
- ➔ If you wish to revert to the Company level **Template** for this **Customer**, simply click on the dropdown menu and select **[Choose a Template]**
- ➔ Just remember, if you do need to make content changes **(Admin -> Templates)** to a **Template**, you should first check which **Template** is in use by the **Customer** so that you are assured that you are editing the correct **Template**

Deleting Templates

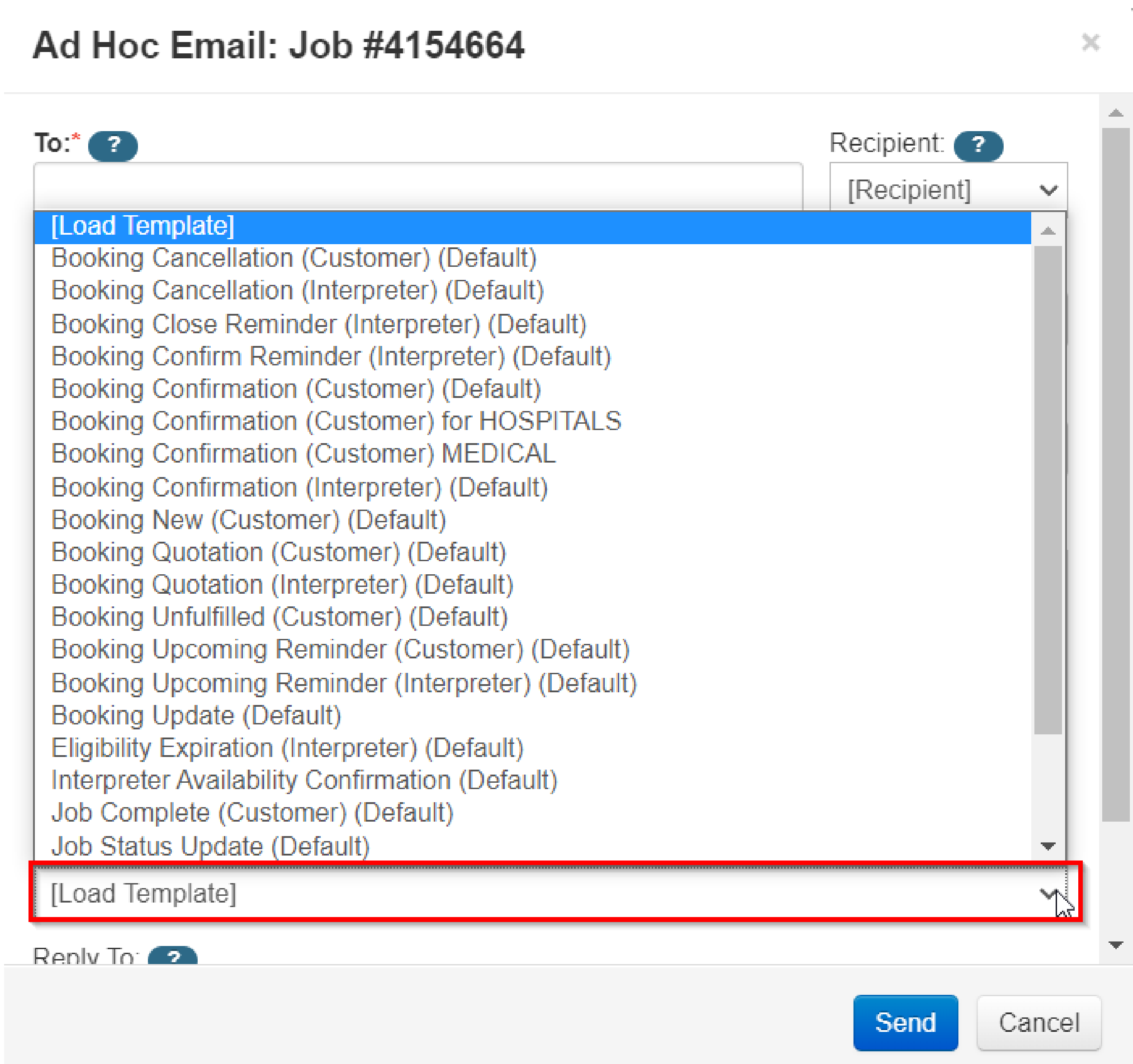
If you wish to remove any old or redundant Templates they can be deleted.
Simply access the Template as per above by clicking on the corresponding elipsis. You can then click the Delete button. As a failsafe, the system will not allow you to Delete any template that is in use i.e. assigned at either a Company or Customer level.



Adhoc Emails using Templates

You can send a manual/adhoc email on a Job using **Templates**. This means that if you wish to send an email outside of the normal workflow of automatic **Notifications** you can do so by using the Adhoc email function and load a specific template for that email.

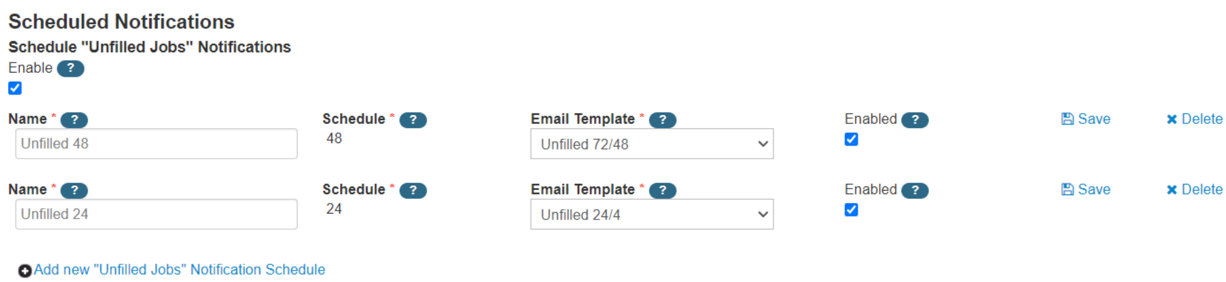
Go to the **'Home'** menu and click **'Manage Jobs'**, click on the Job action menu next to the relevant Job and select **Send Adhoc email.**
Type in the relevant email address in the **To:** box or you can select a **Recipient** from the dropdown menu, select the **Load Template** menu at the bottom and you can then choose from all available **Templates** to load the desired content into the email. You can also manually adjust the content in the **Body** of the email as you wish, finally click the **Send** button.
This email will be stored in the **Notifications** tab of the Job along with all other emails that have or will be sent on the Job.



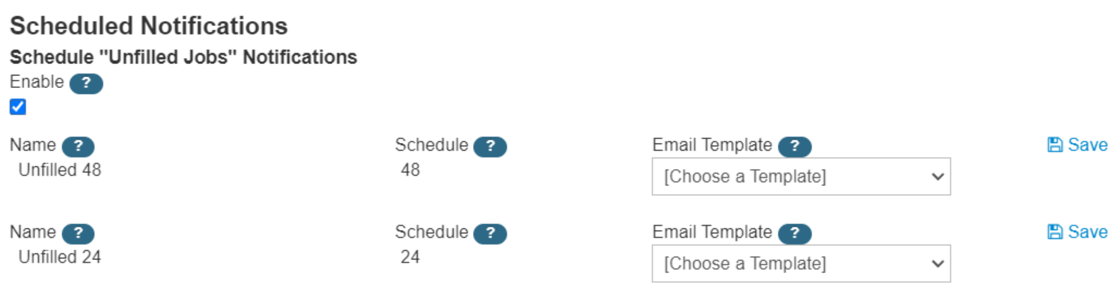
Unfilled Actions & Templates

We have introduced a new feature which will allow you to automatically schedule **Notifications** to **Customers** for **Jobs** that have not yet been assigned (**New**, **Open**, **Offered** status) within a scheduled time frame prior to the **Expected Start Date/Time** of the **Job**.

- ➔ Navigate to the **'Admin'** menu and select **'Company'**, click on the **Notifications** tab
- ➔ Check the **Enable** box under **Schedule "Unfilled Jobs" Notifications** at the bottom of the page
- ➔ Click on **Add new "Unfilled Jobs" Notification Schedule**, provide a **Name** for the schedule such as "Unfilled 48", add the **Schedule** in hours for this notification such as 48, i.e. the amount of time in advance of the **Expected Start Date/Time** that the notification will be sent, select the **Email Template** that will be used for this notification, click on the **Enabled** box and click on the **Save** link next to the schedule
  Note: one **Unfilled Template** will be supplied by default under **Admin** -> **Templates** which can be modified as usual or can be Duplicated if you wish to have different **Templates** for different Unfilled schedules
- ➔ If you wish to create another **"Unfilled Jobs" Notification Schedule** such as for 24 hours in advance of the **Expected Start Date/Time**, simply repeat the steps above



- ➔ Finally, you will also need to enable this for individual **Customers** that you wish to send these notifications to
- ➔ Navigate to the **'Admin'** menu and select **'Customers'**
- ➔ Search for and select the customer in the list on the left hand side
- ➔ Check the **Enable** box under **Schedule "Unfilled Jobs" Notifications** at the bottom of the page, this will populate with the schedule just defined in the **Company** section
- ➔ If you wish you can also select specific **Email Templates** for this **Customer**; select the template from the list and click on the **Save** link next to the schedule, otherwise leave the Email Template selections blank which will default to the templates selected for the **Company**
- ➔ Click on the blue **Save** button on the top left hand side for this **Customer**
- ➔ Repeat the steps above for any additional Customers



SMS Templates

There are also templates for sms messages (if this service has been enabled for your agency) which can be found on the **SMS Templates** tab.

As per **Email Templates**, you will notice that there are some **Templates** available that have been pre populated and these can also be modified by using snippets.

The most important thing to note with sms messages and hence the corresponding **Templates** is that **there is a character restriction of 160 including blank spaces**. You can view the character count by previewing the template and if this is exceeded due to any changes it will need to be further modified to meet the character limit or the corresponding sms messages will fail to send.
Be aware also that certain variables could have an additional character count than an example that you have previewed such as a **Service Location** address and there is a method to truncate/abbreviate this as outlined in the **SMS Help** tab.
(**Important Note:** if using the **'Send Ad Hoc sms'** function on the **Job** menu and loading an sms template, the same character restrictions will apply if you add any text to the message. For example, if you load the **Offer by sms** template in an ad hoc sms and this template already has a character account of 131, you can only add another 29 characters to the message or it will fail to send.)

There is an additional tab, **SMS Help** which will provide some guidance on updating sms **Templates** and some troubleshooting information when sms errors are received.

Other Templates

You will notice that there are other tabs within the **Templates** menu such as **Verification of Service**, **Invoice**, **Payment** etc. If you wish to make any changes to these templates we recommend that you contact support@interpreterintelligence.com so that we can evaluate these and either carry out the changes on your behalf or guide you through the process.