Templates Manual

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1. **Accessing Templates**
    a. To access the "Templates" admin tool mouseover your name on the top right of the page
    b. Then select "School Settings"
    c. Once on the school settings page select the "Templates" admin tool
    d. Once there you will see all the different template options (described below) and you can select whichever category of templates you would like in order to create/modify your templates
2. **Creating New Templates**
    a. Once you select your template category, you will see a list of existing templates, as well as the "Create New Template" button. You can click the "Edit" button to modify an existing template or the button to create a new template.
    b. When you create a new template, you will see a drop down called "Insert Field"
    c. This allows you to dynamically draw any field from the lead/student/alumni profile in order to personalize your template (such as First Name, Program Name, etc)
    d. You are also able to draw the campus name, address, the recruiters name, footer, etc. This way you can just have one template and share it amongst your campuses/recruiters

3. **Shared Templates for Manual Use**
    a. On the “Templates” page you will see a heading called “Shared Templates”
    b. These are the templates you can create for users to send out manually
    c. Any templates that you create are available in the “Template” drop down for your users when they go to send an email, text, or print a letter
    d. When you create/modify your template, you will see a field called “Share this Template with Certain Role(s)”
    e. You can select which role(s) should have access to this template, and you can easily share the template with these roles, while maintaining one centralized copy
4. **Automated Templates**
    You will see a heading called “Automated Messaging” with the following available options. These are emails that will be sent automatically when certain conditions are met:
    a. **Autoresponders (New Leads)**
    Any templates that you create in this category will automatically be sent to new leads as soon as they fill out your forms. You are able to use the “Control Field” filters, if you wish to filter your emails by program. You are then able to send a different automated response based on the leads program if interest
    b. **Delayed Autoresponders (New Leads)**
    You are also able to set a delay to any autoresponder, and have it go out X days after the lead was received. This way you can send a promotional email ahout your school school 2 days after they first contacted you, 7 days, 14 days, 30 days, etc. As many as you wish. These templates can promote your school, successful graduates, top reasons to attend, links to book a tour, apply online, employer testimonials, etc. To set a delay to an autoresponder, go to the “Filter” heading, and then the “Type” field. Here you can change it from an “Immediate Autoresponder” to a “Delayed Autoresponer” and then set how many days the email should be delayed.
    c. **Automated Stage Emails/SMS**
    Here you can create emails that automatically go out when a student reaches a stage in your admissions process. For example, if you have a stage called “Submitted an Application” you could set an automated email to go out when the student has reached this stage. This can tell the lead that the application has been received and what the next steps are. For all templates you can create an email template, a text message template, or both.
    d. **Appointment Confirmation/Reminders**
    Here you can create automated emails that go out for all calendar stages. Calendar stages are steps in your admissions process that need to be booked on a calendar, such as a Campus Tour. For all calendar stages you can create two automated templates. One for when the stage was booked, this can include details like what to bring, directions, how to re-schedule, etc. And then you can create an additional templates for the appointment reminder. This will automatically go out 24 hours before the

appointment date/time to help with your show rate. For all templates you can create an email template, a text message template, or both.

e. **Program Status (Students)**
   Here you can create automated emails that go out when students reach certain student statuses. This is for CampusLogin | Students clients only. You can create a different email that will go out when a program status is changed. For example, if the students status changed to “Drop Out”, you can send a templated email. Or if they change to “Graduate” a different email can go out. For all templates you can create an email template, a text message template, or both.