



## How to Setup Email Template Customization

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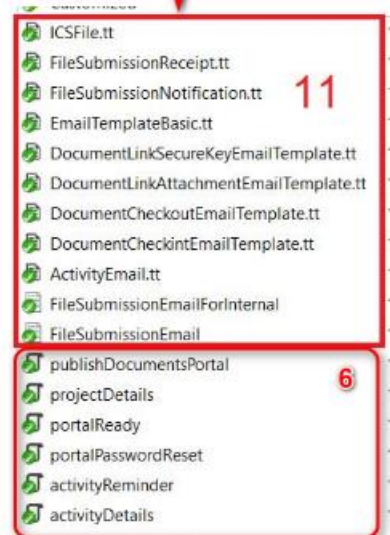
## Custom Notification Emails

Previously, emails that were generated in iChannel only had the ability to use six (6) **out-of-the-box non-customized email notification templates**. With this release, Clients can now request to customize up to **18 Notification Emails**.

Below outlines the 18 notification templates for customization in iChannel:

- 6 of the 18 Custom Notifications Email templates can be modified by an organization without the engagement of iChannel Support. The six (6) templates are (version release date):
  - File Added to Portal [PublishDocumetPortal] v2.20.0
  - Password Change [PortalPasswordReset] v2.20.0
  - Welcome to Portal [PortalReady] v2.20.0
  - Projects [ProjectDetails] v2.20.3
  - Activities [ActivityReminder] v2.20.3
  - Activities Details [ActivityDetails] v2.20.3
- 12 of the 18 Custom Notification Email templates requires the engagement of iChannel Support due to their complexity in the configuration, in addition these 12 Custom Notification Email templates are not in the .Json file format. The 12 templates are:
  - ICSFile
  - FileSubmissionReceipt
  - FileSubmissioinNotification
  - EmailTemplateBasic
  - DocumentLinkSecureKeyEmailTemplate
  - DocumentLinkAttachmentEmailTemplate
  - DocumentCheckoutEmailTemplate
  - DocumentCheckinEmailTemplate
  - ActivityEmail
  - FileSubmissionEmailForInternal
  - FileSubmissionEmail
  - InternalDocumentsAdded

Customizable templates which are handled by the iChannel support team



Customizable template which can be customized by the client it-self



To customize and implement the 12 Customized Notification Email templates, please contact [Conarc Support](#).



This guide is limited to only the steps necessary for an organizations to configure the 6-Customized Notification Email templates.

## Email Template Management - Custom Email Template Folder

To create custom notification emails, a new **custom email template folder** would need to be created. This folder identifies the process flow for sending a custom email template that is dependent on the availability of the defined custom email templates in the custom email template folder.

The following outlines the general use of the email template folder:

- The use of a Custom Email Template folder helps prevent the custom email template being updated (reversed) to the iChannel system default standard email template [.json file template], each time an organization is updated.
- Accordingly, with the aim of preventing the above statement from happening, it's expected to create a custom email template folder where the user shall copy the content of the default email template [.json files], place in the folder and customize the templates to meet their organization's "subject body content". When iChannel searches for the email template, it will first search for the custom folder with the updated changes. Therefore, ignoring the "subject body content" located in the default email folder.
- Custom Email Template folder paths shall follow an agreed naming convention, or the folder path shall be configured by the user to point to the folder containing the template.

## Email Template Management - Folder arrangement for Email Templates

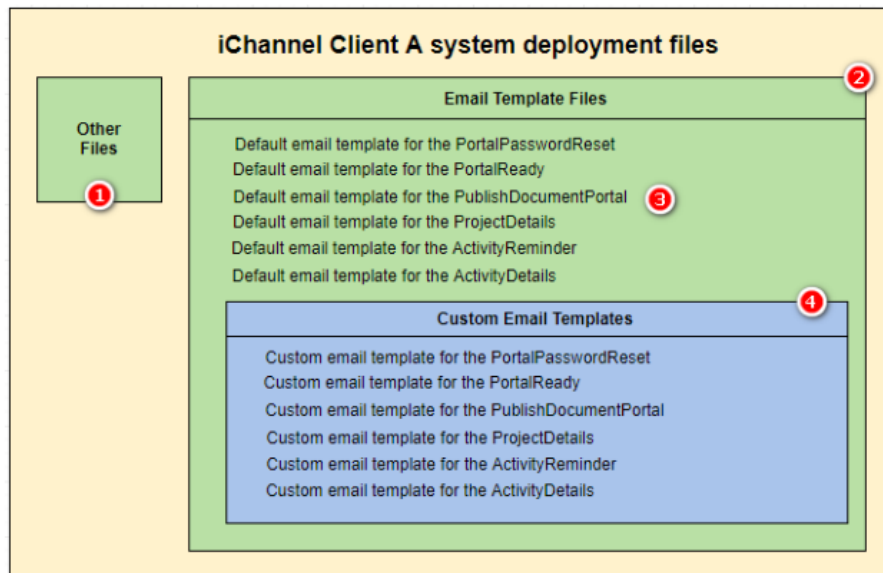


Figure 1.0 - Deployment File Structure



In the initial deployment, the deployment files will have the above file structure as shown in *Figure 1.0*.

1. The iChannel deployment will have a folder of its own with all the **Other Files [1]** that are related to the current deployment along with the **Email Template Files** folder **[2]**.
2. The **Email Template Files** folder **[2]** consists of the *Default json email templates* **[3]** for;
  - Default email template for the PortalPasswordReset (v2.20.0)
  - Default email template for the PortalReady (v2.20.0)
  - Default email template for the PublishDocumentPortal (v2.20.0)
  - Default email template for the ProjectDetails (v2.20.3)
  - Default email template for the ActivityReminder (v.2.20.3)
  - Default email template for the ActivityDetails (v2.20.3)
3. Another folder shall be available as '**Custom Email Templates**' **[4]** inside the main 'Email Template Files' folder **[2]**.
4. Each default email template .Json file **[3]** can be copied to the Custom folder and customize, as needed.



**Note:** It's recommended not to change the file name of the Json file as system will identify it by the given name.

## Email Template Management – Flow of Custom Email Template Request

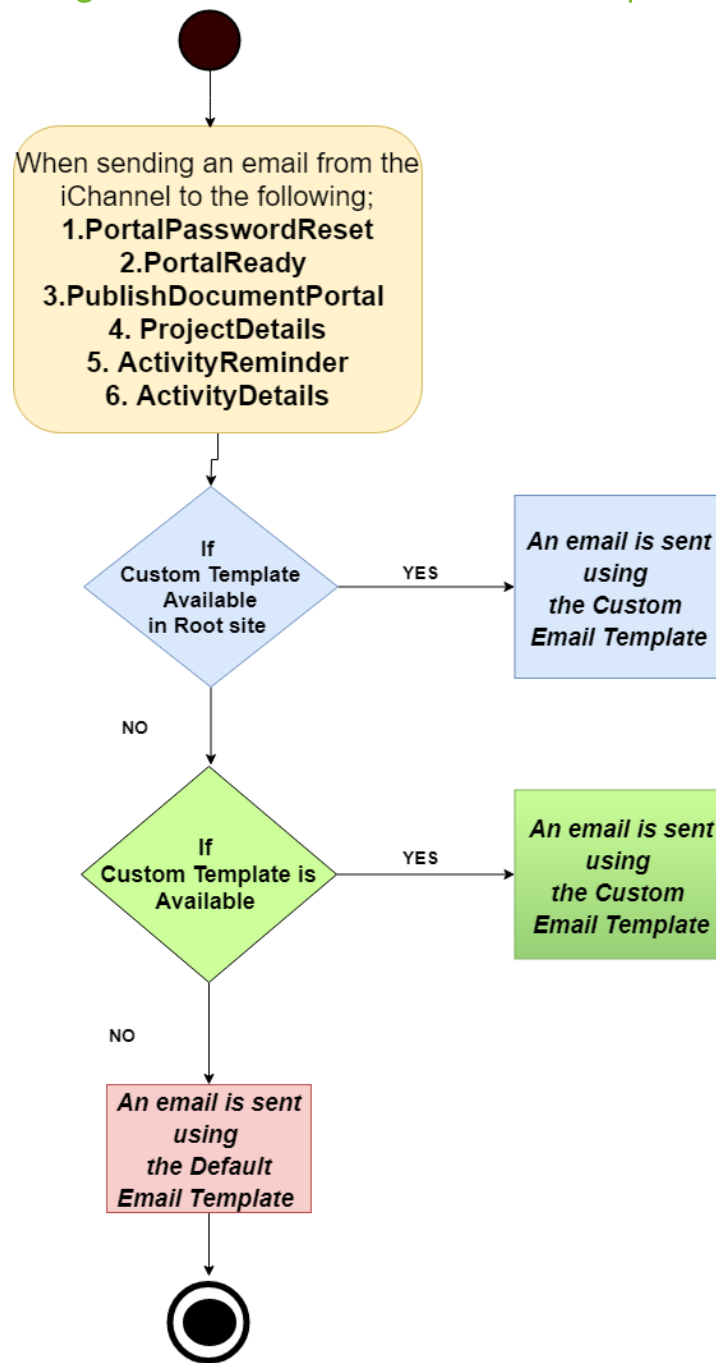


Figure 1.2 - Flow of custom email template request

## Email Template Customization – Customizable Components of an Email Template

In iChannel there are only six (6) emails that can be customized by the end-user.

Email Type	Description
PORTAL_LOGIN	Portal welcome email
PORTAL_PASSWORD_CHANGE	Portal password reset email
PORTAL_FILE_ADDED	File published to portal email
PROJECT_DETAILS	Change to project details on the project search grid email
ACTIVITY_REMINDER	Reminders (periodically) email
ACTIVITY_DETAILS	Create a task on project email

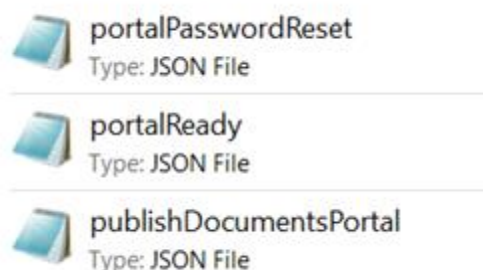
## Email Template Customization – Customizable Components of an Email Template

iChannel provides Organizations to customize two (2) components of an email via the email template customization:

1. Email Subject
2. Email Body

## Email Template Customization – How to customize the email template

- For an Organization to customize the email template(s), organizations should access the file folder which contains the email template(s).
- The file path to locate the email template file folder is dependent on the deployment.
  - Example: the file path of an email template: \\iChannel\Web>EmailTemplates
- The email templates containing files are available in the .json format
  - Example of three (3) customized .json formats:





- By default, these files (in the example) would contain the default email template which is standard with iChannel initial deployment.
- The email template can be configured by editing the afore-mentioned files (by copying those files to the custom email template folder first).
- As the email template configuration files are maintained in .json format (editable files), organizations are advised to use an appropriate text editor (i.e. Notepad) or a .json interpreter.
- When an organization determines to edit a custom notification email template, it's content can be edited along with the allowed keywords. Acceptable keywords are defined for each template and discussed in detail the following section.

## Email Template Customization – Supported Keyword Configurations of each Template



**Note:** Keywords are easily understandable by the “#” sign. If two “#” symbols are used in both the beginning and the end of word, it's considered as a keyword. I.e., ##keyword##

### Email Template Customization – Portal Login Email Template

Default email template and the supported keywords for the “Portal login email template” are as follows:

#### Portal Login Email Default Template

```
{
  "Subject": "Portal Is Ready",
  "Body": "<html><head> <title></title></head><body><div style=\"font-family: Arial; font-size: smaller\"><table> <tr><td>Click this ##link## to login</td> </tr></table> </div></body></html>"
}
```

#### Supported Keyword Configurations

Keyword	Description
##link##	Portal URL
##subscriberName##	Receiver Name (Subscriber to the Portal)
##password##	Portal login password

### Email Template Customization - Portal Password Change Email Template

Default email template and the supported keywords for the “Portal password change email template” are as follows:



## Portal Password Change Email Template

```
{
  "Subject": "Portal Password Reset",
  "Body": "<html><head> <title></title></head><body><div
style=\"font-family: Arial; font-size: smaller\"><table> <tr><td>Your Access
Information:</td> </tr><tr><td>User Id:
##userId##</td></tr><tr><td>Your Temporary iChannel Password:
##password##</td></tr></table> </div></body></html>"
}
```

### Supported Keyword Configurations

Keyword	Description
##userId##	Portal login user ID
##password##	Portal login temporary password

## Email Template Customization – Portal File Added Email Template

Default email template and the supported keywords for the “Portal file added email template” are as follows:

### Portal File Added Email Default Template

```
{
  "Subject": "Documents Uploaded to the Portal (##channel##/##topic##)",
  "Body": "<html><head> <title></title></head><body><div
style=\"font-family: Arial; font-size: smaller\"><table>
<tr><td>_____iChannel Notification_____please Do NOT
Reply_____</td></tr></br> <tr><td><b>User :
</b>##userName##</td></tr> <tr><td><b>Created :
</b>##createdDate##</td></tr></br><tr><td> </td></tr>
<tr><td><b>Site/Filearea : </b>##clientName##</td></tr>
<tr><td><b>Channel : </b>##channel##</td></tr> <tr><td><b>Topic :
</b>##topic##</td></tr></br> <tr><td> </td></tr>
<tr><td><b><u>Documents</u></b> </td></tr> <tr><td>
##documentsF1## </td></tr> </table> </div></body></html>"
}
```

### Supported Keyword Configurations

Keyword	Description
##firstName##	First name of the user who has published documents to the portal



##lastName##	Last name of the user who has published documents to the portal
##userId##	User ID of the user who has published documents to the portal
##createdDate##	Published date time
##clientName##	Name of the client
##channel##	Channel (Folder)
##topic##	SubFolder
##documentsF1##	<p>Document list with the following format</p> <ul style="list-style-type: none"> <li>Title : - Document Name</li> <li>FileName :-Absolute name of the document (named saved in file path)</li> <li>I.e.:</li> </ul> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #add8e6;"> <p> Title: testFile1</p> <p>FileName: 2022-testMove-Tax-testFile1-2012-TAX-7252019 103035AM.txt</p>   <p>Title: testFile2</p> <p>FileName: 2022-testMove-Tax-testFile2-2012-TAX-7252019 103035AM.txt</p> </div>
##documentsF2##	<p>Document list with the following format</p> <ul style="list-style-type: none"> <li>Folder Name (Channel)/Sub Folder Name/Document Name</li> <li>I.e.</li> </ul> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #add8e6;"> <p> • testChannelN/test1n/testDoc1</p> <p>• testChannelN/test1n/testDoc2</p> </div>

## Email Template Customization – Project Details Email Template

Default email template and the supported keywords for the “Project details email template” are as follows:

### Portal File Added Email Default Template



```
{
  "Subject": "iChannel Project Completed: ##name##",
  "Body": "<table><tr><td><Strong>Project
Details</Strong></td></tr><table><tr><td><B>Name:</B>
##name##</td></tr><tr><td><B>Priority:</B>
##priority##</td></tr><tr><td><B>Type:</B>
##type##</td></tr><tr><td><B>Status:</B> ##status##
##campaign##</td></tr><tr><td><B>Start:</B>
##start##</td></tr><tr><td><B>Due:</B>
##due##</td></tr><tr><td><B>Created:</B>
##created##</td></tr><tr><td><B>Modified:</B>
##modified##</td></tr><tr><td><B>Contacts:</B>
##contacts##</td></tr><tr><td><B>Clients:</B>
##clients##</td></tr><tr><td><B>Notes:</B>
##notes##</td></tr></table>"
}
```

## Supported Keyword Configurations

Keyword	Description
##name##	Like the existing fields of a project in iChannel
##priority##	
##type##	
##campaign##	
##start##	
##status##	
##due##	
##created##	
##modified##	
##contacts##	
##clients##	
##notes##	

## Email Template Customization – Activity Reminder Email Template

Default email template and the supported keywords for the “Activity reminder email template” are as follows:



## Activity Reminder Email Default Template

```
{
  "Subject": "iChannel: ##type##",
  "Body": "<table><tr><td><Strong>-----Activity
Details-----</Strong></td></tr><table><tr><td><B>Type:</B>
##type##</td></tr><tr><td><B>Start:</B>
##start##</td></tr><tr><td><B>Stop:</B>
##stop##</td></tr><tr><td><B>Subject:</B>
##subject##</td></tr><tr><td><B>Entity:</B>
##entity##</td></tr><tr><td><B>Notes:</B>
##notes##</td></tr><tr><td><B>Contacts:</B>
##contacts##</td></tr><tr><td><B>Modified:</B>
##modified##</td></tr><tr><td><B>Created:</B>
##created##</td></tr><tr><td><B>-----</B></td
></tr></table>"
}
```

## Supported Keyword Configurations

Keyword	Description
##type##	Similar to the existing fields of an activity in iChannel
##start##	
##stop##	
##subject##	
##entity##	
##contacts##	
##notes##	
##modified##	
##created##	

## Email Template Customization – Activity Details Email Template

Default email template and the supported keywords for the “Activity Details email template” are as follows:



## Activity Details Email Default Template

```
{
  "Subject": "iChannel: ##type## - ##subject##",
  "Body": "<table><tr><td><Strong>-----Activity
Details-----</Strong></td></tr><table><tr><td><B>Type:</B>
##type##</td></tr><tr><td><B>Start:</B>
##start##</td></tr><tr><td><B>Stop:</B>
##stop##</td></tr><tr><td><B>Subject:</B>
##subject##</td></tr><tr><td><B>Status:</B>
##status##</td></tr><tr><td><B>Entity:</B>
##entity##</td></tr><tr><td><B>Entity ID:</B>
##entityId##</td></tr><tr><td><B>Project:</B>
##project##</td></tr><tr><td><B>Notes:</B>
##notes##</td></tr><tr><td><B>Contacts:</B>
##contacts##</td></tr><tr><td><B>Modified:</B>
##modified##</td></tr><tr><td><B>Created:</B>
##created##</td></tr><tr><td><B>-----</B></td>
></tr><tr><td></td></tr><tr><td>To add this to your Outlook calendar,
double click on the attachment</td></tr></table>"
}
```

## Supported Keyword Configurations

Keyword	Description
##type##	Similar to the existing fields of an activity in iChannel
##subject##	
##start##	
##stop##	
##subject##	
##status##	
##entity##	
##entityId##	
##project##	
##notes##	
##contacts##	
#created##	

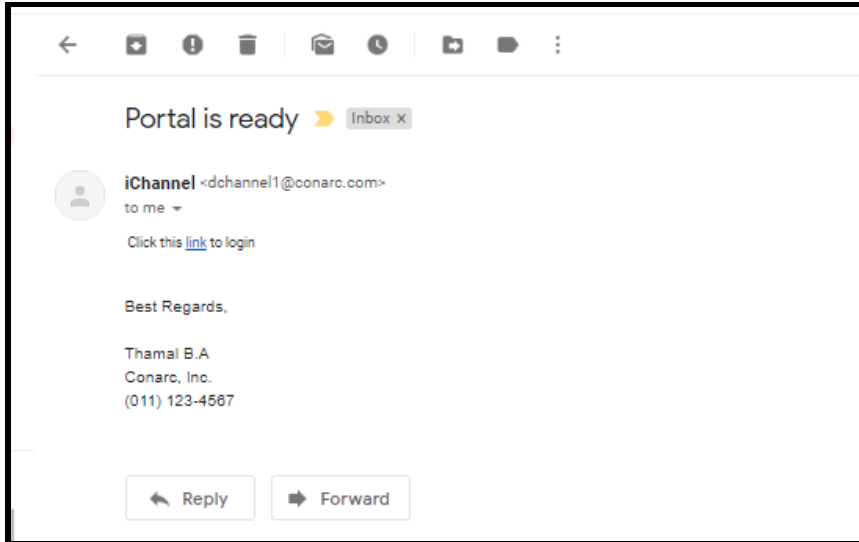


##modified##

## Email Template Customization – Sample Customization Templates

The below provides examples of templates.

### Portal Login Email Template

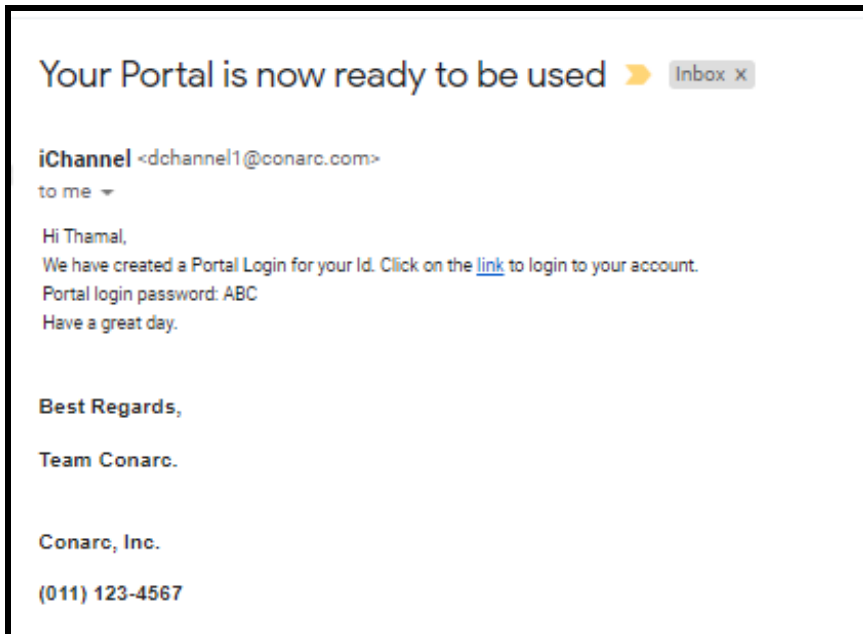


### Portal Login Email Default JSON Template

```
{
  "Subject": "Portal is ready",
  "Body": "<html><head><title></title></head><body><div style=\"font-family: Arial; font-size: smaller\"><table> <tr><td>Click this <a href=\"##link##\">link</a> to login</td> </tr></table> </div></body></html>"
}
```



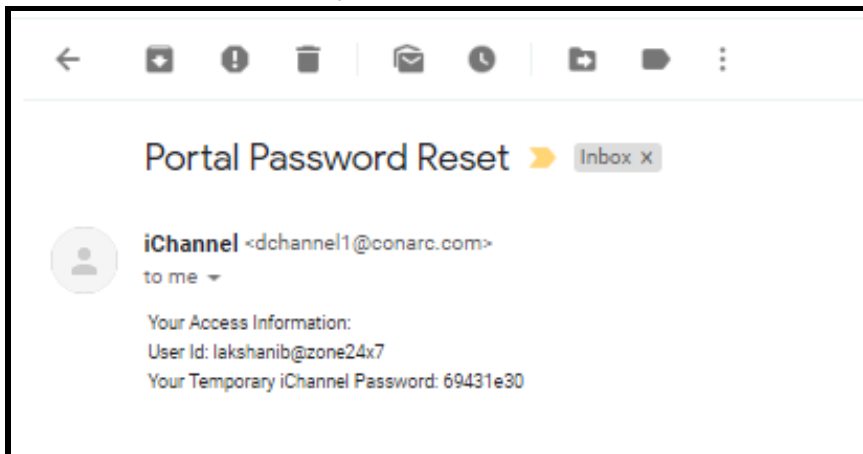
## Portal Login Email Custom Template



## Portal Login Email Custom JSON Template

```
{  
  "Subject": "Your Portal is now ready to be used",  
  "Body": "<html><head><title></title></head><body><div style=\"font-family: Arial; font-size: smaller\"><table><tr><td>Hi ##subscriberName##,</td></tr> <tr><td>We have created a Portal Login for your Id. Click on the <a href=\"##link##\">link</a> to login to your account.</td></tr><tr><td>Portal login password: ##password##</td></tr><tr><td>Have a great day.</td></tr></table> </div></body></html>"  
}
```

## Portal Password Reset Email Template

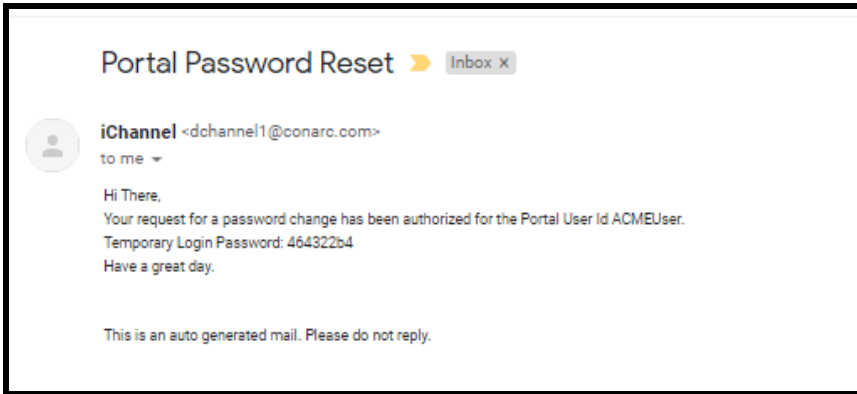




## Portal Password Reset Default Email JSON Template

```
{
  "Subject": "Portal Password Reset",
  "Body": "<html><head> <title></title></head><body><div style=\"font-family: Arial; font-size : smaller\"><table> <tr><td>Your Access Information:</td> </tr><tr><td>User Id: ##userId## </td></tr><tr><td>Your Temporary iChannel Password: ##password##</td></tr></table> </div ></body></html>"
}
```

## Portal Password Reset Custom Email Template



## Portal Password Reset Custom Email JSON Template

```
{
  "Subject": "Portal Password Reset",
  "Body": "<html><head> <title></title></head><body><div style=\"font-family: Arial; font-size : smaller\"><table> <tr><td>Hi There,</td> </tr><tr><td>Your request for a password change has been authorized for the Portal User Id ##userId##.</td></tr><tr><td>Temporary Login Password: ##password##</td></tr><tr><td>Have a great day.</td></tr><br><br><tr><td>This is an auto generated mail. Please do not reply.</td></tr></table> </div></body></html>"
}
```

## Portal File Added Email Template



## Portal File Added Default Email JSON Template

```
{
  "Subject": "Documents Uploaded to the Portal (##channel##/##topic##)",
  "Body": "<html><head> <title></title></head><body><div style=\"font-family: Arial; font-size : smaller\"><table> <tr><td>_____iChannel Notification__please Do NOT Reply_____</td></tr>></br> <tr><td><b>User : </b>##userName##</td></tr> <tr><td><b>Created : </b>##createdDate##</td></tr></br><tr><td> </td></tr> <tr><td><b>Site/Filearea : </b>##clientName##</td></tr><tr><td><b>Channel : </b>##channel##</td></tr> <tr><td><b>Topic : </b>##topic##</td></tr></br>> <tr><td> </td></tr> <tr><td><b><u>Documents</u></b> </td></tr> <tr><td> ##documentsF1##</td></tr> </table> </div></body></html>"
}
```

## Portal File Added Custom Email Template – Instance 1

iChannel <dchannel1@conarc.com>  
to me -

Hi Thamal De Silva  
This is to notify that, ADMINISTRATOR USER - ADMIN has uploaded files to the channel1 under the topic1 on 9/26/2019 3:28 PM.

Details of the documents are as follows

Title: Tax-test1  
FileName: 2022-testMove-Tax-test1-2012-TAX-8142019 93630AM.txt

Title: Tax-report  
FileName: 2022-testMove-Tax-report-2012-TAX-9232019 24255PM.txt

Feel free to contact us for any inquiries.  
Have a great day.

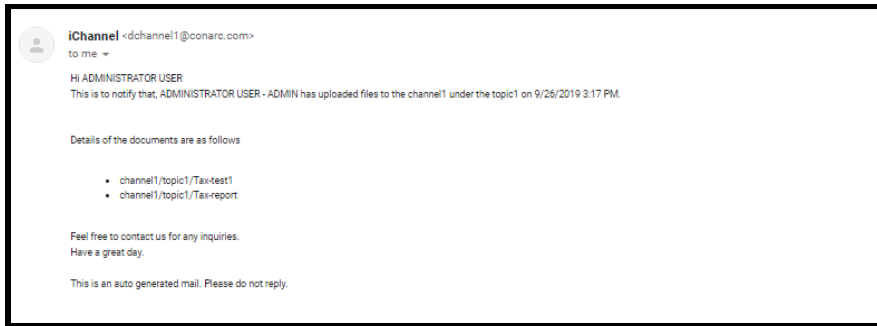
This is an auto generated mail. Please do not reply.

## Portal File Added Custom Email JSON Template – Instance 1

```
{
  "Subject": "Documents Uploaded to the Portal (##channel##/##topic##)",
  "Body": "<html><head> <title></title></head><body><div style=\"font-family: Arial; font-size : smaller\"><table><tr><td>Hi ##subscriberName##</td></tr><tr><td>This is to notify that, ##userName## has uploaded files to the ##channel## under the ##topic## on ##createdDate##.</td></tr><br><br><tr><td>Details of the documents are as follows</td></tr><br><tr><td>>##documentsF1##</td></tr><br><tr><td>Feel free to contact us for any inquiries.</td></tr><tr><td>Have a great day.</td></tr><br><tr><td>This is an auto generated mail. Please do not reply.</td></tr></table> </div></body></html>"
}
```



## Portal File Added Custom Email Template – Instance 2



## Portal File Added Custom Email JSON Template – Instance 2

```
{  
  "Subject": "Documents Uploaded to the Portal (##channel##/##topic##)",  
  "Body": "<html><head>  <title></title></head><body><div style=\"font-family: Arial; font-size  
: smaller\"><table><tr><td>Hi ##subscriberName##</td></tr><tr><td>This is to notify that,  
##userName## has uploaded files to the ##channel## under the ##topic## on ##createdDate##  
.</td></tr><br><br><tr><td>Details of the documents are as follows</td></tr><br><tr><td  
>##documentsF2##</td></tr><br><tr><td>Feel free to contact us for any inquiries.</td></tr><tr>  
<td>Have a great day.</td></tr><br><tr><td>This is an auto generated mail. Please do not  
reply.</td></tr></table> </div></body></html>"  
}
```

