

Create a Message Event Template

[Go to full article](#)

Overview

This article guides users how to create and edit an email (message) template in the [Events](#) module. This article is written generically and is applicable to all message events. For information specific to the event you wish to use, look for the event in [the Event Library](#).



If you wish to have emails appear to come from your own domain, you must [validate your domain](#) first prior to creating any templates.

Create a New Template

To begin creating a template, navigate to the path below.

Events > Templates > Email

Click the **Create New Email Template** button. The *Create a Template* page shown on the right will appear.

Give the template a suitable **Name**.

From the **Event Type** drop down list, choose the event type this template is for.

Once an event type has been chosen from the list, the system will perform a check to see if your service provider account has been configured with an instance (or more) of the selected event. If so, the **Event Mapping** list will change to display all instances of the event for any given account profile (if relevant).

Select the relevant **Event Mapping** from the drop down list.



The list will only show the event mappings that have been enabled. If the event type you want is not in the mapping list, please contact Emersion.

Always select a specific event mapping unless advised.

In the **Sender** field, enter an email address that the email notification is from. This becomes the Reply To address.



Please ensure you use a valid email address in the Sender field to ensure you receive any bounce/complaint/error emails from recipient mail servers.

Select the **Recipient** who should receive the notification.



This field uses some business logic to work out the recipient from the end users account.

First it looks for the existence of an email address by first checking the Billing Contact, then Primary Contact.

If neither have a valid email address set, the system will use the email address from the Billing Contact of the parent account (Service Provider).

In the case of an Service Provider -> End User relationship, this would be the billing contact of the Service Provider account. In the case of a Wholesale > Service Provider relationship, this would be the billing contact of the Wholesale account'.

If a custom address is chosen, enter it. Multiple email addresses can be entered, as long as they are separated by a comma.

For example:

```
joe@email.com.au,info@summertime.com.au,accounts@myprovider.com.au
```

Optionally enter a **CC** address

Enter a **BCC** address if required.

The **Postal Email Address field** will be displayed if the event type is chosen to be either:

- [Invoice Due](#)
- [Invoice Overdue](#)

Enter an alternative email address to send the customer's postal invoice to. This requires the customer's account invoice delivery method to be either:

- Post
- Email and Post

Enter a **Subject** for the email notification. Any template variables that are supported by the event type will be shown in a list and can be selected to be included in the subject.

Optionally, set a **Priority**.

Under the *Attachment* options, users can choose to optionally include, as an attachment to the email:

- a PDF of the customer's latest invoice
- an attachment provided by the event. Some event types contain the ability to include an event-specific attachment. See the event's entry in the [Event Library](#) for information on what the attachment will be.

Tick the relevant boxes to include the possible attachments.

Choose an invoice layout type/design from the **Invoice Template Selection** drop down list. If nothing is chosen, the default template will be used. If a different option is chosen, the PDF invoice sent along with the notification will be rendered in the chosen option.

Enter the **Content** that will form the main body of the email.

Use dynamic variables to include stored data.

See out [Event Content Editor](#) for more help

Finalising the Template

When you are done and are happy with the template.

Click the **Save** button. The Template details will be displayed.

Click the **Return to list** button to exit and return to the previous page.

Related Pages

- [Onboarding: Events and SMS Events](#)
- [Create a Message Event Template](#)
- [Email Domains \(DNS Record configuration\)](#)
- [Create an SMS Event template](#)
- [Event Content Editor](#)
- [Add an Event Text Library Template Variable](#)
- [Event: Payment Failed](#)
- [Event: Manual Payment Received](#)
- [Event: Payment Plan Completed](#)
- [Event: Payment Plan Cancelled](#)
- [Event: Payment Plan Created](#)
- [Event: Payment Plan Transaction Failed](#)

- [Event: Invoice Delivery](#)
- [Event: Invoice Due](#)
- [Event: PayWay BPay and Phone Payment Import Unprocessed Payments](#)