

Chapter 12

Email Templates

T.O.M. allows you to select certain predefined events in T.O.M. when you want an email to automatically be sent to up to three recipients for a field trip. T.O.M. also allows you to define in advance what information those emails are to contain and how they are to be worded. In fact T.O.M. allows you to have a different definition for these emails for each of the predefined events. These definitions are saved in Email Templates. T.O.M. comes with a set predefined Email Template that you can use to instruct T.O.M. how to format and word your various automatically generated emails. T.O.M. makes it easy to Email Templates by simply checking and un-checking data options and entering custom messages to be included in the email that T.O.M. automatically sends when the predefined event occurs.

To access the various Email Templates routines open the File menu, then click Other, then click on Templates and then click on Email Templates. The Email Templates List screen (Figure 12- 1) will be displayed.

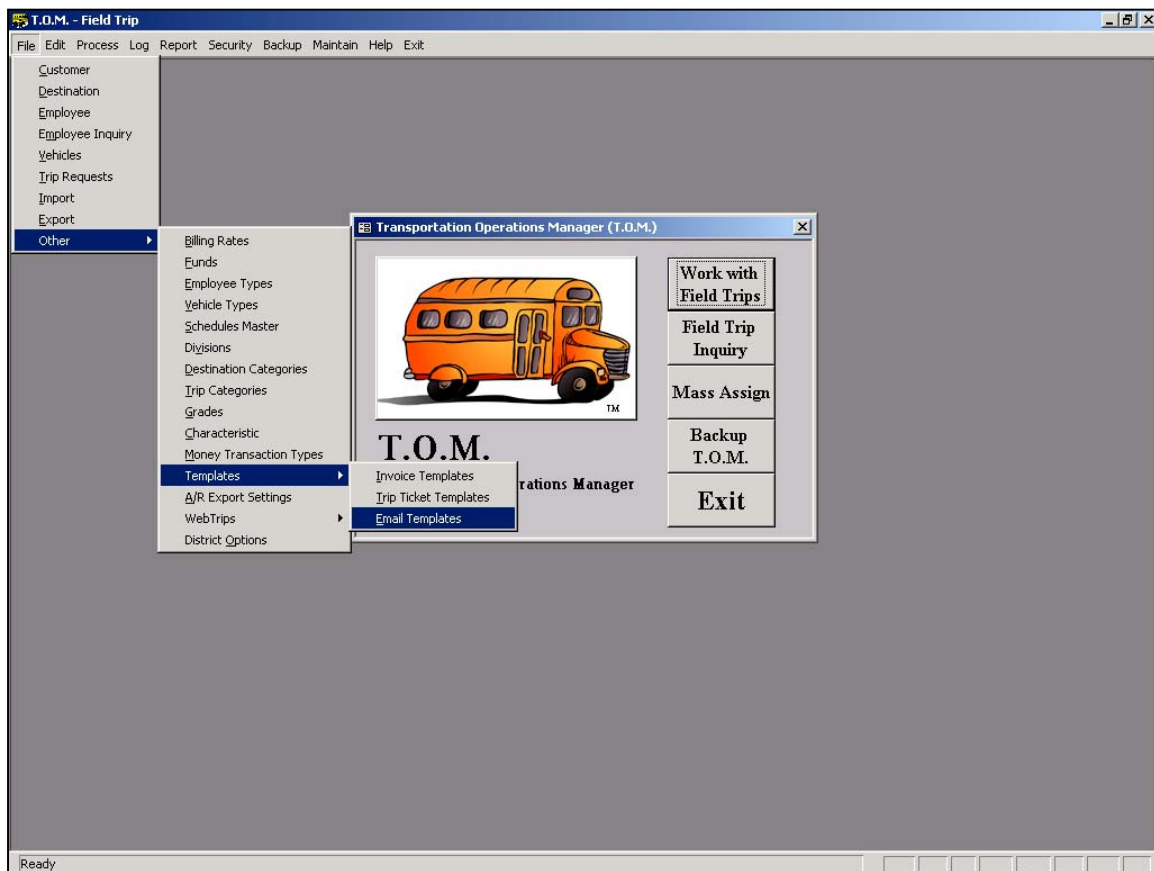


Figure 12- 1. Accessing Email Templates on T.O.M.'s Main Screen

The Email Templates list screen (Figure 12- 2) allows you to change Email Templates that T.O.M. uses when creating automatic email messages. Figure 12- 2 gives a brief explanation of the various function buttons offered to you when you maintain a Email Templates list file.



Working with Email Templates

Email Templates are used by T.O.M. when it is automatically creating an email message when a specific predefined event occurs. You may instruct T.O.M. which event(s) should trigger T.O.M. to automatically create an email message in your District Options Screen (See Chapter 4 of this book). T.O.M. comes with preset Email Templates. One Email Template for each of the predefined events. Figure 12- 3 is a list of all the predefined Email Templates and what predefined event they correspond to.

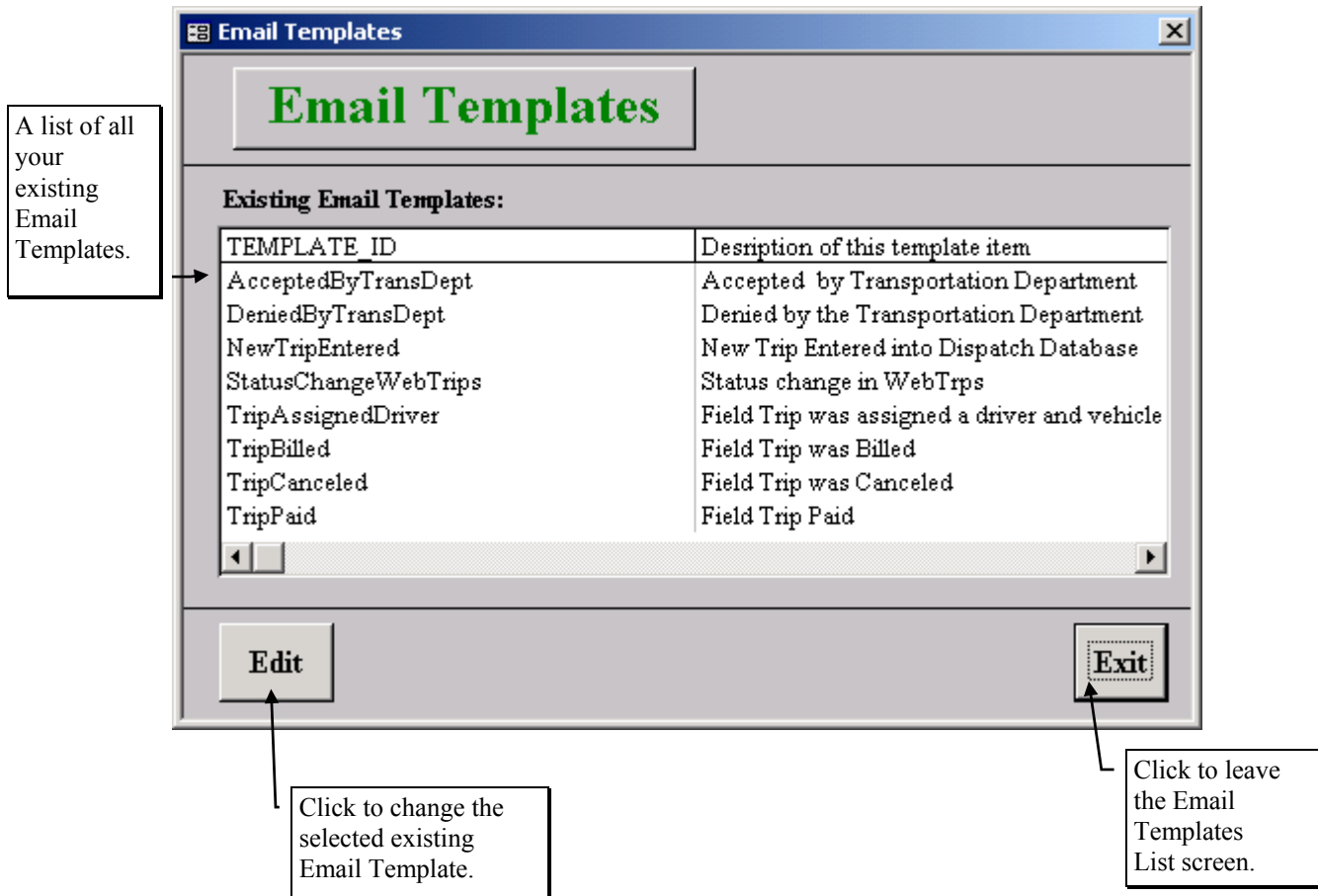


Figure 12- 2 . The Email Templates List Screen



Template Name	T.O.M. Event	Event Description
AcceptedByTransDept	Trip Request was Accepted by Transportation Department	Email is generated when the user clicks on the Accept Button in the Field Trip Request Screen.
DeniedByTransDept	Trip Request was Denied by Transportation Department	Email is generated when the user clicks the Denied Button in the Field Trip Request Screen
NewTripEntered	A new field trip was entered in the dispatching database	Email is generated when the user enters a field trip directly into the dispatching database by clicking the New button in the Work With Field Trips Screen.
StatusChangedWebTrips	A field trip request's status was changed by it being approved by an approver (other than the Transportation Department) in WebTrips.	Email is generated when a WebTrips approver either approves or denies a field trip request in WebTrips.
TripAssignedDriver	An unassigned field trip was assigned a driver and vehicle	Email is generated either when an unassigned trip has a driver and vehicle automatically assigned by T.O.M. or when an unassigned trip is manually assigned a driver and vehicle.
TripBilled	An unbilled field trip was billed.	Email is generated when the field trip is either billed individually or billed in the Mass Bill feature.
TripCanceled	A field trip is canceled.	Email is generated when the user clicks the Cancel Trip button in the Work with Field Trip Screen.
Trip Paid	A field trips billed amount was paid.	Email is generated when the unpaid billed balance of a field trip is paid when user enters a payment in the Bills & Payments screen.

Figure 12- 3 – Table of Predefined Email Templates and Their Descriptions.

Figure 12- 2 shows the Email Templates List screen, which lists all of the Email Templates that you have set up with T.O.M. From this screen you tell T.O.M. if you want modify one of these predefined Email Templates.

Changing an Existing Email Template

If you wish to change an existing Email Template, then select a Email Template on the Email Templates List screen (**Error! Reference source not found.**) by clicking the row containing the desired Email Template and then click the Edit button. You will be taken to the Email Templates Data Entry screen (Figure 12- 4, Figure 12- 5, Figure 12- 6, Figure 12- 7, Figure 12- 8 and Figure 12- 9), which will let you change any of the Email Template print options and titles. To save the Email Template information you have changed, click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Email Templates Data Entry Screen Options* below for a complete description of print selections and title fields.



Email Templates Data Entry Screen Options

The Email Templates Data Entry screen (Figure 12- 4) uses six tabs to help you select your email content options and text for different sections on the email. These tabs are the Email Text tab (Figure 12- 4), the Customer / Destination tab (Figure 12- 5), the Dates / Times tab (Figure 12- 6), the Other tab (Figure 12- 7), Miles / Hours / Passengers tab (Figure 12- 8) and the Trip Requests tab (Figure 12- 9). Click on the tab to see its options. The following describes the data to include options and captions for these tabs.

Template ID: The ID that is assigned a Email Template. You can not change this ID.

Template Description: The long description of the Email Template. This description can be a maximum of 50 characters. This field appears at the top of the Email Template no matter which tab section you select.

The Email Text Tab on the Email Templates Data Entry Screen

Click on the Top Section tab in the Email Templates Data Entry screen (Figure 12- 4), if it is not already displayed. These selections print in the top section of your trip ticket.

Subject of Email: This is the one line text that appears in the subject line of the automatic email message that is generated by T.O.M.

Text at Beginning of Email: This is the text that is at the beginning of your full email text. It will display before any other information. It is unlimited in length.



Email Template

Template ID: DeniedByTransDept

Description: Denied by the Transportation Department

Email Text | Customer / Destination | Dates / Times | Other | Miles/Hours/Passengers | Trip Requests

Subject of Email: Trip Request Denied by Transportation Department

Text at Beginning of Email: The following field trip request was denied by the Transportation Department.

Text at End of Email: If you have any questions please feel free to contact us.
Sincerely,

Show: **Title:**

Trip #: ☒ Trip #:

OK **Exit**

Figure 12- 4 - The Email Text Section Tab on the Email Templates Data Entry Screen

Text at End of Email: This is the text that appears at the very end of the email message that T.O.M. automatically generates. It is unlimited in length.

Trip #: Check this checkbox in the Show column to include the trip number of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the trip number will display in front of the trip number in your email text. You may change this title.

The Customer / Destination Tab on the Email Templates Data Entry Screen

Click on Customer / Destination tab in the Email Templates Data Entry screen (Figure 12- 5), if it is not already displayed.



Email Template																																
Template ID: DeniedByTransDept																																
Description: Denied by the Transportation Department																																
Email Text	Customer / Destination	Dates / Times																														
<table border="1"><thead><tr><th></th><th>Show:</th><th>Title:</th></tr></thead><tbody><tr><td>Customer #</td><td><input checked="" type="checkbox"/></td><td>Customer #:</td></tr><tr><td>Customer Name:</td><td><input checked="" type="checkbox"/></td><td>Customer Name:</td></tr><tr><td>Customer Address:</td><td><input checked="" type="checkbox"/></td><td>Customer Address:</td></tr><tr><td>Bill Customer #:</td><td><input checked="" type="checkbox"/></td><td>Billing Customer #:</td></tr><tr><td>Bill Customer Name:</td><td><input checked="" type="checkbox"/></td><td>Billing Customer:</td></tr><tr><td>Bill Customer Addr:</td><td><input checked="" type="checkbox"/></td><td>Billing Customer Address:</td></tr><tr><td>Destination:</td><td><input checked="" type="checkbox"/></td><td>Destination:</td></tr><tr><td>Destination Address:</td><td><input checked="" type="checkbox"/></td><td>Destination Address:</td></tr><tr><td>Division:</td><td><input checked="" type="checkbox"/></td><td>Division:</td></tr></tbody></table>				Show:	Title:	Customer #	<input checked="" type="checkbox"/>	Customer #:	Customer Name:	<input checked="" type="checkbox"/>	Customer Name:	Customer Address:	<input checked="" type="checkbox"/>	Customer Address:	Bill Customer #:	<input checked="" type="checkbox"/>	Billing Customer #:	Bill Customer Name:	<input checked="" type="checkbox"/>	Billing Customer:	Bill Customer Addr:	<input checked="" type="checkbox"/>	Billing Customer Address:	Destination:	<input checked="" type="checkbox"/>	Destination:	Destination Address:	<input checked="" type="checkbox"/>	Destination Address:	Division:	<input checked="" type="checkbox"/>	Division:
	Show:	Title:																														
Customer #	<input checked="" type="checkbox"/>	Customer #:																														
Customer Name:	<input checked="" type="checkbox"/>	Customer Name:																														
Customer Address:	<input checked="" type="checkbox"/>	Customer Address:																														
Bill Customer #:	<input checked="" type="checkbox"/>	Billing Customer #:																														
Bill Customer Name:	<input checked="" type="checkbox"/>	Billing Customer:																														
Bill Customer Addr:	<input checked="" type="checkbox"/>	Billing Customer Address:																														
Destination:	<input checked="" type="checkbox"/>	Destination:																														
Destination Address:	<input checked="" type="checkbox"/>	Destination Address:																														
Division:	<input checked="" type="checkbox"/>	Division:																														
OK Exit																																

Figure 12- 5. Customer / Destination Tab on the Email Templates Data Entry Screen

Customer #: Check this checkbox in the Show column to include the customer number of the customer of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the customer number will display in front of the customer number in your email text. You may change this title.

Customer Name: Check this checkbox in the Show column to include the name of the customer of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the customer name will display in front of the customer name in your email text. You may change this title.

Customer Address: Check this checkbox in the Show column to include the address of the of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the customer address will display in front of the customer address in your email text. You may change this title.

Bill Customer #: Check this checkbox in the Show column to include the Bill To Customer number of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Bill Customer number will display in front of the Bill To Customer number in your email text. You may change this title.

Bill Customer Name: Check this checkbox in the Show column to include the name of the Bill To Customer of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you



check this checkbox the title next to the check box for the Bill Customer name will display in front of the Bill To Customer name in your email text. You may change this title.

Bill Customer Address: Check this checkbox in the Show column to include the address of the Bill Customer of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Bill Customer address will display in front of the Bill To Customer address in your email text. You may change this title.

Destination: Check this checkbox in the Show column to include the description of the Destination of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Destination will display in front of the description of the Destination in your email text. You may change this title.

Destination Address: Check this checkbox in the Show column to include the address of the Destination of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Destination Address will display in front of the address of the Destination in your email text. You may change this title.

Division: Check this checkbox in the Show column to include the Division of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Division will display in front of the Division in your email text. You may change this title.

The Dates / Times Tab on the Email Templates Data Entry Screen

Click on Dates / Times tab in the Email Templates Data Entry screen (Figure 12- 6), if it is not already displayed.

Departure Date: Check this checkbox in the Show column to include the Departure Date of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Departure Date will display in front of the Departure Date in your email text. You may change this title.

Return Date: Check this checkbox in the Show column to include the Return Date of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Return Date will display in front of the Return Date in your email text. You may change this title.

Departure Time: Check this checkbox in the Show column to include the Departure Time of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Departure Time will display in front of the Departure Time in your email text. You may change this title.



	Show:	Title:
Departure Date:	<input checked="" type="checkbox"/>	Departure Date:
Return Date:	<input checked="" type="checkbox"/>	Return Date:
Departure Time:	<input checked="" type="checkbox"/>	Departure Time:
Return Time:	<input checked="" type="checkbox"/>	Return Time:

Figure 12- 6- The Dates / Times Tab on the Email Templates Data Entry Screen

Return Time: Check this checkbox in the Show column to include the Return Time of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Return Time will display in front of the Return Time in your email text. You may change this title.

The Other Tab on the Email Templates Data Entry Screen

Click on the Other tab in the Email Templates Data Entry screen (Figure 12- 7), if it is not already displayed.

Fund: Check this checkbox in the Show column to include the primary Fund # of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Fund # will display in front of the Fund # in your email text. You may change this title.

Fund Description: Check this checkbox in the Show column to include the description of the primary Fund of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Fund Description will display in front of the Fund Description in your email text. You may change this title.

Purpose: Check this checkbox in the Show column to include the Purpose of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to



the check box for the Purpose will display in front of the Purpose in your email text. You may change this title.

Internal Trip #: Check this checkbox in the Show column to include the Internal Trip # of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Internal Trip # will display in front of the Internal Trip # in your email text. You may change this title.

Contact: Check this checkbox in the Show column to include the Contact of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Contact will display in front of the Contact in your email text. You may change this title.

Email Template	
Template ID:	DeniedByTransDept
Description:	Denied by the Transportation Department
<div> Email Text Customer / Destination Dates / Times Other Miles/Hours/Passengers Trip Requests </div>	
Show:	Title:
<input checked="" type="checkbox"/> Fund:	Fund:
<input checked="" type="checkbox"/> Fund Description:	Fund Description:
<input checked="" type="checkbox"/> Purpose:	Purpose:
<input checked="" type="checkbox"/> Internal Trip #:	Internal Trip #:
<input checked="" type="checkbox"/> Contact:	Contact:
<input checked="" type="checkbox"/> Grade:	Grade:
<input checked="" type="checkbox"/> PO #:	P.O.#:
<div> OK Exit </div>	

Figure 12- 7. The Other Tab on the Email Templates Data Entry Screen

Grade: Check this checkbox in the Show column to include the Grade of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Grade will display in front of the Grade in your email text. You may change this title.

PO #: Check this checkbox in the Show column to include the PO # of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the PO # will display in front of the PO # in your email text. You may change this title.



The Miles / Hours / Passengers Tab on the Email Templates Data Entry Screen

Click on the Miles / Hours / Passengers tab in the Email Templates Data Entry screen (Figure 12- 8), if it is not already displayed.

The screenshot shows a software window titled "Email Template". Inside, there's a header area with the title "Email Template" in purple. Below this, there are two text input fields: "Template ID:" with the value "DeniedByTransDept" and "Description:" with the value "Denied by the Transportation Department". A tabbed interface is present with six tabs: "Email Text", "Customer / Destination", "Dates / Times", "Other", "Miles/Hours/Passengers" (which is selected), and "Trip Requests". The "Miles/Hours/Passengers" tab contains a table with two columns: "Show:" and "Title:". The table has five rows, each with a checkbox in the "Show:" column and a text input field in the "Title:" column. The rows are: "Miles:" (checkbox checked), "Hours:" (checkbox checked), "Total Passengers:" (checkbox checked), "# of Students:" (checkbox checked), and "# of Adults:" (checkbox checked). Below the table, there are two more rows: "# of Wheel Chair:" (checkbox checked) and "Number of Wheel Chair:" (text input field). At the bottom of the window, there are two buttons: "OK" and "Exit".

Show:	Title:
<input checked="" type="checkbox"/>	Miles:
<input checked="" type="checkbox"/>	Hours:
<input checked="" type="checkbox"/>	Total Passengers:
<input checked="" type="checkbox"/>	Number of Students:
<input checked="" type="checkbox"/>	Number of Adults:
<input checked="" type="checkbox"/>	Number of Wheel Chair:

Figure 12- 8 - The Miles / Hours / Passengers Tab on the Email Templates Data Entry Screen

Miles: Check this checkbox in the Show column to include the Estimated Miles of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Miles will display in front of the Estimated Miles in your email text. You may change this title.

Hours: Check this checkbox in the Show column to include the Estimated Hours of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Hours will display in front of the Estimated Hours in your email text. You may change this title.

Total Passengers: Check this checkbox in the Show column to include the Total Passengers (total of the field trips students and adults) of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Total Passengers will display in front of the Total Passengers in your email text. You may change this title.

of Students: Check this checkbox in the Show column to include the number of students of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the



title next to the check box for the number of students will display in front of the number of students in your email text. You may change this title.

of Adults: Check this checkbox in the Show column to include the number of adults of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the number of adults will display in front of the number of adults in your email text. You may change this title.

of Wheelchair: Check this checkbox in the Show column to include the number of wheelchair bound passengers of the field trip that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the number of wheelchair will display in front of the number of wheelchair bound passengers in your email text. You may change this title.

The Trip Requests Tab on the Email Templates Data Entry Screen

Click on the Trip Requests tab in the Email Templates Data Entry screen (Figure 12- 9), if it is not already displayed.

The screenshot shows a window titled "Email Template" with a close button (X) in the top right corner. Inside the window, there is a header area with the text "Email Template" in a large, bold, purple font. Below this, there are two text input fields: "Template ID:" with the value "DeniedByTransDept" and "Description:" with the value "Denied by the Transportation Department". Below these fields is a tabbed interface with six tabs: "Email Text", "Customer / Destination", "Dates / Times", "Other", "Miles/Hours/Passengers", and "Trip Requests". The "Trip Requests" tab is currently selected. Inside this tab, there is a section titled "Show: Title:" with a checkbox labeled "Comment by Transportation Department" which is checked. To the right of the checkbox is a text input field containing the text "Transportation Comments". At the bottom of the window, there are two buttons: "OK" on the left and "Exit" on the right.

Figure 12- 9 - The Trip Requests Tab on the Email Templates Data Entry Screen

Comment by Transportation Department: Check this checkbox in the Show column to include the Comment by the Transportation Department of the field trip request that had the predefined event occur to it in the email generated by T.O.M. If you check this checkbox the title next to the check box for the Comment by Transportation Department will display in front of the Comment by the Transportation



Department in your email text. You may change this title. NOTE: This field will only be included in the Trip Requested Accepted, Trip Request Denied and Trip Request Status Change in WebTrips predefined events.