Letter Template

Module Guide: Letter Template

Module Location

Settings > Document Settings > Letter Template

Module Purpose

The **Letter Template** module serves as a central hub for creating and managing templates for letters and emails that the system will use for automated communications. These templates are used for various purposes, such as notifications, reminders, approval confirmation letters, and other notices sent automatically to users.

1. Main View (List of Letter Templates)

The main page of this module displays a list of all letter templates defined within the system. From this page, users can search for and select a template they wish to edit.

View Explanation

- **Search Filter**: Allows users to search for a specific template by its **Template Code**.
- **Letter Template Table**:
  - **No**: Sequential number.
  - **Template Code**: A unique code that identifies each template (e.g., `ActivityAcknowledgment`, `BASTLetter`).

    - **Template Name**: A name or brief description of the letter template.

- **Action Buttons**: To edit a template, users typically click on the corresponding row to open the editor page.

2. Edit Letter Template Page

This page is the editor where users can modify the content and subject of the selected letter template.

View Explanation

- **Language**: An option to specify the language of the template being created or edited (e.g., Indonesian, English), enabling multilingual communication.

- **Letter Title**: The title or subject line of the email/letter that will be sent.

- **Variables Used**: Displays a list of variables that can be inserted into the letter. These variables will be replaced by dynamic data from the system when the letter is sent.

- **Letter Content**: The main text editor area for writing or changing the body of the letter. This editor supports rich text formatting, such as bold, italics, and more. Users can insert dynamic variables (e.g., `{EmployeeName}`, `{Duration}`, `{TableData}`) to personalize the content.

    > “Dear {EmployeeName},

> There are activities under your supervision that have not been updated for more than {Duration} hour(s). Please do something about it.
>
> Below is the data:
> {TableData}

- **Note**: An area to provide internal notes related to the template.
- **Action Buttons**:
  - **Update**: Saves the changes made to the template.
  - **Reset**: Reverts the editor's content to its state before any changes were made.
  - **Cancel**: Discards all changes and returns to the list page.

Integrated Workflow & Business Process

- Templates created in this module are automatically called by the system based on specific triggers. For example, the `ConfirmFinalApproval` template will be used to send an email notification when a document has been finally approved.
- The use of dynamic variables allows the system to send personalized emails. For instance, `{EmployeeName}` will be automatically filled with the name of the intended employee, and `{TableData}` will be populated with a relevant data table from the transaction.

Tips & Important Notes

- Ensure that the variable names used in the **Letter Content** are correct and match the list of available variables to ensure data is displayed properly.
- Use the **Language** feature to create different versions of a template for communication in different languages, if the system supports it.
- Changes to these templates will directly affect all automated communications that use them. Perform tests before saving changes to crucial templates.

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