



# Manage Email Templates

All booth sales emails can be updated through the MYS Show Dashboard when your site is ready for review/testing. Follow along for a step-by-step guide to updating email templates.

## Default Content

MYS has created default email templates for the booth sales process, but your team can update the templates as needed.

[View the default content for all booth sales emails.](#)

## Manage Users & Roles

To edit content, users must have the 'manage email templates' permission enabled. The 'All Access' role includes this permission by default; however, your team can update other roles to allow editing. For additional details, refer to our resources on managing users and user roles.

[Manage Admin Users](#) & [Manage User Roles](#)

# Edit Email Content

Whether you access from Staging (test site) or Production (live site), **all email templates are edited on Staging** so you can control when the changes are published to the live site.

Navigate to the Show Dashboard and access the 'Sales' menu in the main navigation. Follow this path to make updates: **Sales > Booth Sales > Sales Options/Settings > Email Templates.**

- 1 To edit a template, **click on the email name**. Review the description, which details when the email is applied and the last updated date.

**Description:** Automatically sent when an applicant selects 'Bill Me' as the payment option in the booth sales application. By default, includes invoice as an attachment.

**Last Updated:** *Never, Currently using MYS default template.*

- 2 **Enabling will send the email when the specified scenario outlined in the description occurs.**

*In this case, enabling will send the email when the applicant selects 'Bill Me.' If disabled, an email will not be sent upon selecting 'Bill Me.'*

- 3 Some **emails can be sent automatically**, while others are available for show management to send or resend as needed.

*For example, if the Customer Approval email is set to 'Yes, Send Email Automatically,' the email would be sent as each customer is approved. Select 'No' if you prefer to send all customer approval emails at once.*

#### 4 Update the email fields as needed.

- From Name
- Reply to Address
- CC Address
- BCC Address
- Email Subject

Use the checkboxes to mark items to be attached. Attachment options will vary per email.

**Attachments:**

Contract

Invoice/Statement

#### 5 Update the copy as necessary, and when composing your email, **drag and drop the placeholders** to personalize it. MYS will replace these tags with actual recipient data when the email is sent.

- CUSTOMER INFO

[CUSTOMER\_COMPANYNAME] ?

[CUSTOMER\_ADDRESS] ?

[CUSTOMER\_CITY] ?

+ PRIMARY CONTACT INFO

+ EXHIBITOR INFO



*\*The placeholder tags display as field names within the MYS database. Scroll over the question mark icons to ensure the form field labels are correct, as sometimes MYS data fields are used for alternative data.*

#### 6 Click 'Update Template' to save.

#### 7 Lastly, **publish your changes**. While enabling will send the email when a specified scenario occurs, publishing will move your email template updates from Staging to Production.

**To publish, click the Publish button in parentheses at the end of the row.**

Email	Type	Description	Enabled	Published
Credit Statement	Credit	Sent when Show Management uses the 'Email' option on the Customer Overview/Available Credit Statement option within the admin/customer record.  <i>Template: MYS Default</i>	Yes	No (Publish)

