
Customizing Templates

Passerelle Remote Support allows you to personalize NPS (Net Promotor Score), Email and Sms messages by creating your own templates.

This article contains the following information:

- ▣ [List of templates you can customize](#)
- ▣ [How to access the templates customization screen](#)
- ▣ [How to use template codes](#)
- ▣ [List of template properties](#)
- ▣ [How to change the template for Privacy Statement message](#)
- ▣ [How to change the template for the Email for Call Invites](#)
- ▣ [How to change the template for the SMS for Call Invites](#)
- ▣ [How to change the template for the email to invite a new user](#)
- ▣ [How to change the template for the text of the End Call Questionnaire](#)

Templates you can customize

As Passerelle Remote Support administrator you can customize :

- the Message to accept your Privacy Statement
template code : **gdpr.web.body**
- the Email sent as support call invitation
template codes : **invite-supportcall.email.subject** & **invite-supportcall.email.body**
- the SMS sent as support call invitation
template code : **invite-supportcall.sms.body**
- the email sent to invite a new user
template codes : **invite-user.email.subject** & **invite-user.email.body**
- the Text shown as End Call Questionnaire
template code : **kpi.web.body**

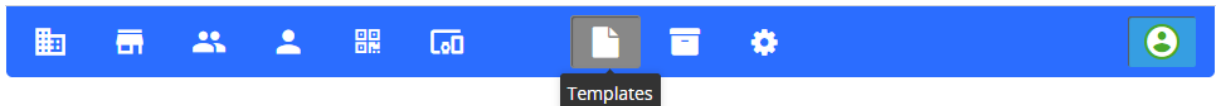
If you do not customize templates, the default template will be used.

How to access the templates customization screen

1. Open the link to the admin application
(<https://xxx.passerelle.supportsquare.io/support/admin>)
Login as site admin.
Other user roles are not capable to change the templates.

2. Select Settings : 

3. Select menu item Templates :



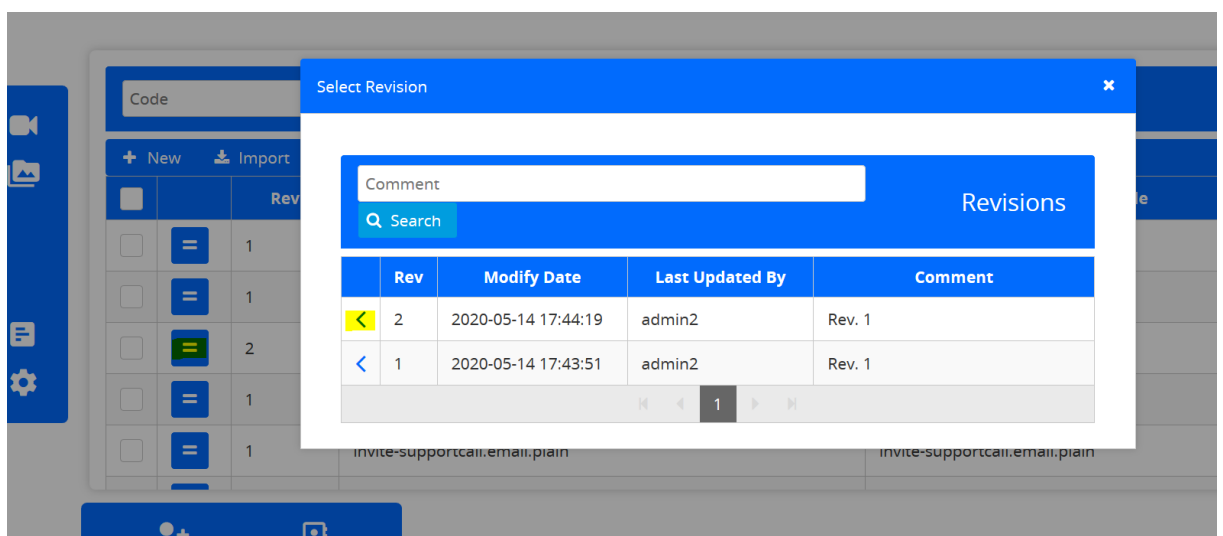
Or

you can use following link to access immediately the Templates menu :

<https://xxx.passerelle.supportsquare.io/support/admin/templates/>

How to use template codes

- Each template (for email, sms, gdpr, kpi, ...) has another template code. The code follows the pattern : **[name].[type].[subtype]**
For example : **invite-supportcall.email.body**
This is the template code for the body of the email message sent as support call invite :
name = invite-supportcall.
type = email
subtype = body
- If you do not create a template for a specific type, the default template will be used for this type of message.
From the moment you create a template, it overrides the default template for all languages.
- There is support for internationalization.
You can use different templates for different languages.
The template for each language looks like : **[name].[language].[type].[subtype]**
For example : **gdpr.fr.web.body**.
This represents the template for the French message for acceptance of the Privacy Statement.
For languages without a template, the **gdpr.web.body** template will be used.
- The templates are versioned. So it is always possible to roll back to a previous version.
If you delete a template, the default will be used again.



List of template properties

By using properties you can further personalize your messages.

This is the list of available properties, usable in all types of templates :

<u>Property</u>	<u>Description</u>
\$url	url to start the support call (web or app)
\$tenant	Tenant
\$requester.firstName	First name of the invited user
\$requester.lastName	Last name of the invited user
\$requester.nickname	Full name of the invited user
\$requester.phoneNumber	Phonenumber of the invited user
\$requester.email	Email of the invited user
\$operator.firstName	First name of the operator
\$operator.lastName	Last name of the operator
\$operator.nickname	Full name of the operator

How to change the template for Privacy Statement acceptance

Template code: **gdpr.web.body**

Example:

```
Please accept our <a href="https://supportsquare.io/privacy-statement"
target="_blank">privacy terms</a>.
```

How to change the template for the Email for Call Invites

- o **Email subject**

Template code to change the email subject : **invite-supportcall.email.subject**

Example

```
Passerelle Support - $tenant Support Call Invitation
```

- o **Email body**

Template code to change the email body : **invite-supportcall.email.body**

Example

```
<div>
<table style="box-shadow: 0px 30px 60px -30px rgba(0, 0, 0, 0.45);"
border="0" width="100%" cellpadding="0" cellspacing="0"
bgcolor="#191B31">
<tbody>
<tr>
<td width="10">&nbsp;</td>
<td colspan="3" height="80">&nbsp;</td>
</tr>
<tr>
<td width="10">&nbsp;</td>
<td align="center"><div
style="border: 0; text-align: center; max-width: 625px;
font-family: 'Raleway', 'Segoe UI', 'San Francisco',
'Helvetica Neue', 'Helvetica', sans-serif;">
<table
style="border-radius: 8px; box-shadow: 0px 30px 60px -30px rgba(1, 107, 253, 0.45);"
border="0" width="auto" cellpadding="0" cellspacing="0"
bgcolor="#ffffff">
<tbody>
<tr>
<td width="80">&nbsp;</td>
<td align="center" height="100"></td>
<td width="80">&nbsp;</td>
</tr>
<tr>
<td width="80">&nbsp;</td>
<td width="515"><div
style="color: #48514f; font-size: 0.83rem; margin-top: 18px;
text-align: left; line-height: 21px; font-weight: 300;">
<h3>Support call invitation</h3>
You have been invited by <strong>$operator.nickname</strong>
for a <strong>$tenant</strong> support call.<br> <br>
<strong><a
style="text-decoration: underline; color: #403f44;"
href="$url">Accept the support call invitation. This
link is active for $expires hour.</a></strong>
</div></td>
<td width="80">&nbsp;</td>
</tr>
<tr>
<td width="80">&nbsp;</td>
</tr>
</tbody>
</table>
</div>
```

```

        <td width="80">&nbsp;</td>
        <td align="center"><br> <a href="$url"></a></td>
        <td width="80">&nbsp;</td>
    </tr>
</tr>
<tr>
<td width="80">&nbsp;</td>
<td style="height: 80px; color: #403f44; font-size: 15px;"
    align="center"><p>
        <small>
            style="display: inline-block; padding-top: 11px; font-size: 10px;"><a
            style="text-decoration: underline; color: #403f44;"
            href="https://supportsquare.io/contact/">Contact</a>
            SupportSquare for help<br> <a
            style="text-decoration: underline; color: #403f44;"
            href="https://supportsquare.io/portfolio/passerelle-remotesupport/">Learn
            more</a> about Passerelle Remote Support</small>
        </p></td>
<td width="80">&nbsp;</td>
</tr>
</tbody>
</table>
</div>
<div
    style="color: #ffffff; font-size: 12px; margin-bottom: 10px; margin-top: 20px;
        font-family: 'Segoe UI', 'San Francisco', 'Helvetica Neue',
        'Helvetica', sans-serif; font-weight: 300; letter-spacing: .1em;">
<a href="https://supportsquare.io/"></a><br> <br> &copy;2018
SupportSquare. All rights reserved.<br> Voorhavenlaan 31/011
9000 Gent Belgium<br> <br> <a
    style="color: #ffffff; text-decoration: underline;"
    href="https://supportsquare.io/privacy-statement/">Privacy
    Policy</a>
</div></td>
<td width="10">&nbsp;</td>
</tr>
<tr>
<td colspan="3" height="30">&nbsp;</td>
<td width="10">&nbsp;</td>
</tr>
</tbody>
</table>
</div>

```

How to change the template for the SMS for Call Invites

Template code: **invite-supportcall.sms.body**

ATTENTION: the length of an sms is limited!
Try to limit the number of characters to 80.

Example

```
$url
```

```
With above link, $operator.nickname from $tenant invites you for a support call
```

How to change the template for the email to invite a new user

- o **Email subject**

Template code : **invite-user.email.subject**

Example :

```
Passerelle Support - $tenant User Invitation
```

- o **Email body**

Template code: **invite-user.email.body**

Example

```
<div>
  <table style="box-shadow: 0px 30px 60px -30px rgba(0, 0, 0, 0.45);"
    border="0" width="100%" cellspacing="0" cellpadding="0"
    bgcolor="#191B31">
    <tbody>
      <tr>
        <td width="10">&nbsp;</td>
        <td colspan="3" height="80">&nbsp;</td>
      </tr>
      <tr>
        <td width="10">&nbsp;</td>
        <td align="center"><div
          style="border: 0; text-align: center; max-width: 625px; font-family: 'Raleway',
            'Segoe UI', 'San Francisco', 'Helvetica Neue', 'Helvetica', sans-serif;"
          <table
            style="border-radius: 8px; box-shadow: 0px 30px 60px -30px rgba(1, 107, 253, 0.45);"
            border="0" width="auto" cellspacing="0" cellpadding="0"
            bgcolor="#ffffff">
            <tbody>
              <tr>
                <td width="80">&nbsp;</td>
                <td align="center" height="100"></td>
                <td width="80">&nbsp;</td>
              </tr>
              <tr>
                <td width="80">&nbsp;</td>
                <td width="515"><div
                  style="color: #48514f; font-size: 0.83rem; margin-top: 18px;
                    text-align: left; line-height: 21px; font-weight: 300;"
                  <h3>User invitation</h3>
                  You have been invited by <strong>$operator.nickname</strong>
                  to join the <strong>$tenant</strong>
                  Passerelle Support community.<br> <br> <strong><a
                    style="text-decoration: underline; color: #403f44;"
                    href="$url">Accept invitation</a></strong><br> <br>
                  </div></td>
                <td width="80">&nbsp;</td>
              </tr>
            </tbody>
          </table>
        </td>
      </tr>
    </tbody>
  </table>
</div>
```



```

        <tr>
          <td width="80">&nbsp;</td>
          <td style="height: 80px; color: #403f44; font-size: 15px;"
              align="center"><p>
                <small
                  style="display: inline-block; padding-top: 11px; font-size: 10px;"><a
                    style="text-decoration: underline; color: #403f44;"
                    href="https://supportsquare.io/contact/">Contact</a>
                    SupportSquare for help<br>
                    <a style="text-decoration: underline; color: #403f44;"
                      href="https://supportsquare.io/products/">Learn more</a>
                    about the Passerelle Suite</small>
                </p></td>
          <td width="80">&nbsp;</td>
        </tr>
      </tbody>
    </table>
  </div>
  <div
    style="color: #ffffff; font-size: 12px; margin-bottom: 10px; margin-top: 20px;
      font-family: 'Segoe UI', 'San Francisco', 'Helvetica Neue',
      'Helvetica', sans-serif; font-weight: 300; letter-spacing: .1em;">
    <a href="https://supportsquare.io/"></a><br> <br> &copy; 2018
    SupportSquare. All rights reserved.<br> Voorhavenlaan 31/011
    9000 Gent Belgium<br> <br> <a
      style="color: #ffffff; text-decoration: underline;"
      href="https://supportsquare.io/privacy-statement/">Privacy
    Policy</a>
  </div></td>
  <td width="10">&nbsp;</td>
</tr>
<tr>
  <td colspan="3" height="30">&nbsp;</td>
  <td width="10">&nbsp;</td>
</tr>
</tbody>
</table>
</div>

```

How to change the template for the text of the End Call Questionnaire

Template code : **kpi.web.body**

Example:

```
How likely are you to recommend this support video solution to a friend, a colleague or a family member ?
```