# EMAIL TEMPLATE CUSTOMIZATION

**For Onboarding Service Providers | Kakapo Partner Portal**

# EMAIL TEMPLATE CUSTOMIZATION

HTML emails that are sent from the Kakapo partner portal can be customized by System Providers, by providing new email templates that contain the necessary delimiters for correct information to be included in each email. It is important that all mandatory information is included in the email, for example when sending a multi-factor authentication to a user, the [code] delimiter is mandatory. All email templates must use the same file name as those outlined below.

For all of the email templates listed below a link to the default email template used in the portal is provided, as well as a list of the mandatory and optional delimiters that can be used in that template. Delimiters must be exactly the same as those in the list, otherwise they will not be replaced with the correct value when the email template is being processed.

## GROUP CREATED

This email is sent when a new customer Group is added to the portal hierarchy. The email will only be sent if configured in branding settings for the System Provider

Default template: https://portal.unityclient.com/EmailTemplates/GroupCreated.html

| Delimiter Name | Description | Optional or Mandatory |
|---|---|---|
| [PortalBrandingGroupName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'Group.' | Optional |
| [CreationDateTime] | Date and time that the group was created. | Mandatory |
| [TimezoneName] | Time zone that the group was created in. | Mandatory |
| [PortalBrandingSystemProviderName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'System Provider.' | Optional |
| [SystemProviderName] | The name of the system provider that the group was created under. | Mandatory |
| [PortalBrandingResellerName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'Reseller.' | Optional |
| [ResellerName] | The BroadWorks ID of the Reseller that the group was created under. | Mandatory |
| [GroupName] | The BroadWorks ID of the Group that was created. | Mandatory |
| [GroupExternalReference] | The name of the Group that was created | Optional |
| [LoginUser] | The name of the portal admin user that created the new Group. | Mandatory |
| [CreationDescription] | Specifies how the Group was created, for example if it was manually created through the partner portal or API, or automatically created as part of a license request [from a Unity client] when a trial license is assigned. | Optional |

## LOGIN USER ACCOUNT LOCKED

This email is sent when a portal admin's login access is locked.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserAccountLocked.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [Reason] | This is the reason for locking user access, for example if it was manually locked by another user, or because of too many failed login attempts etc. | Optional |

## LOGIN USER ACCOUNT UNLOCKED

This email is sent when a portal admin's login access is locked.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserAccountUnlocked.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |

## LOGIN USER CREATED

This email is sent when a new portal admin account is created.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserCreated.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [LoginID] | The email address of the portal admin that was created. | Mandatory |

## LOGIN USER EMAIL CONTACT CREATED

This is the template to use when an admin email contact-only account is created.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserEmailContactCreated.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |

## LOGIN USER FORGOTTEN PASSWORD

This email is sent when a user clicks the 'forgotten my password' link from the portal login page

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserForgottenPassword.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Mandatory |
| [LoginID] | The email address of the portal admin. | Optional |

## LOGIN USER PASSWORD

This email is sent when a portal admin is receiving their password, either as part of account creation or if the user has forgotten their password.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserPassword.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [Password] | The initial password for the portal admin account. They will be forced to change this after their first successful login. | Mandatory |

## LOGIN USER PASSWORD REMINDER

This email is sent when the 'send password reminder' link is clicked from within the portal user's profile in the partner portal. A new temporary password will be created and sent in the LoginUserPassword email [as outlined above], and the user will be forced to change this password on the next successful login.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserPasswordReminder.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [LoginID] | The email address of the portal admin. | Mandatory |

## LOGIN USER PASSWORD REMINDER WITH VERIFICATION

This email is sent when a password reset is needed for a portal user that has not logged in or verified their email previously.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserPasswordReminderWithVerification.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [LoginID] | The email address of the portal admin. | Mandatory |

## LOGIN USER VERIFICATION REQUIRED

This email is sent when a portal user's account is updated, but they have not yet verified their email address.

Default template: https://portal.unityclient.com/EmailTemplates/LoginUserVerificationRequired.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [LoginID] | The email address of the portal admin. | Mandatory |

## MULTI FACTOR AUTHENTICATION

This email is sent when a user triggers the multi-factor authentication mechanism (generally signing in from a new IP address compared to the last login).
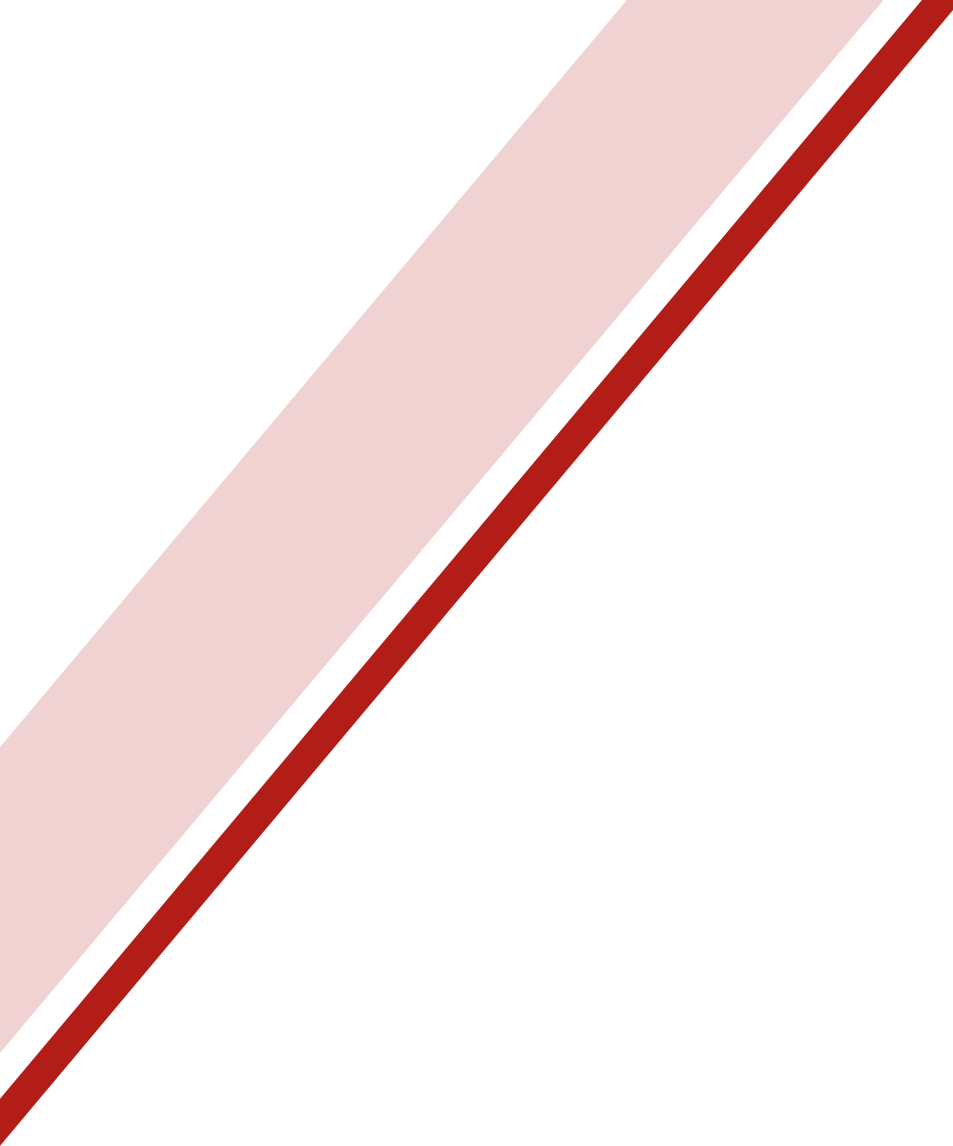
Default template: https://portal.unityclient.com/EmailTemplates/MultiFactorAuthentication.html

| Delimiter Name | Description | Mandatory/Optional |
|---|---|---|
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [PortalPath] | This is the URL of the partner portal, which may have been overridden, for example https://unityportal.myprovider.com. If not overridden this will be https://portal.unityclient.com | Optional |
| [Code] | The code needed to authenticate the user's login attempt. | Mandatory |

## RESELLER CREATED

This email is sent when a new Reseller is added to the portal hierarchy. The email will only be sent if configured in branding settings for the System Provider.

Default template: https://portal.unityclient.com/EmailTemplates/ResellerCreated.html

| Delimiter Name | Description | Optional or Mandatory |
|---|---|---|
| [PortalBrandingResellerName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'Reseller.' | Optional |
| [LogoPath] | Custom logos can be uploaded in the Branding section under the Branding header, and this would be utilized if there is a custom logo uploaded. | Optional |
| [CreationDateTime] | Date and time that the Reseller was created. | Mandatory |
| [TimezoneName] | Time zone that the Reseller was created in. | Mandatory |
| [PortalBrandingSystemProviderName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'System Provider.' | Optional |
| [SystemProviderName] | The name of the System Provider that the Reseller was created under. | Mandatory |
| [PortalBrandingResellerName] | Alternate names can be used for the different levels of BroadWorks hierarchy under Unity Partner Portal Configuration & Branding, this would be used if there is an alternate entered in for 'Reseller.' | Optional |
| [ResellerName] | The BroadWorks ID of the Reseller that was created | Mandatory |
| [ResellerExternalReference] | The name of the Reseller that was created. | Optional |
| [LoginUser] | The name of the user that created the new Reseller. | Mandatory |
| [CreationDescription] | Specifies how the Reseller was created, for example if it was manually created through the partner portal or API, or automatically created as part of a license request [from a Unity client] when a trial license is assigned. | Optional |