

Interactions tab - Emails - Templates

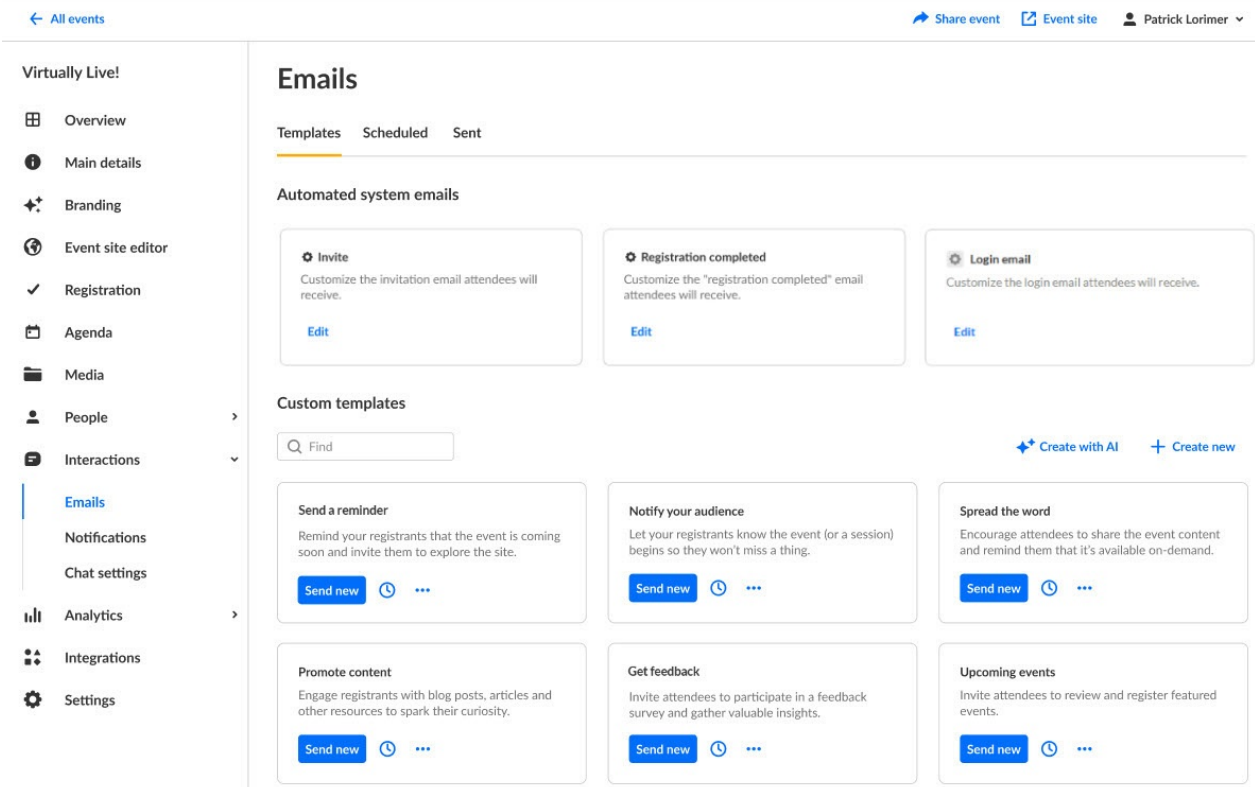
Last Modified on 10/23/2024 4:26 pm IDT


 This article is designated for all users.

About

On the Templates tab (shown below), you may:

- Edit the automated system emails, including "Invite", "Registration Complete", and "Login email".
- Create (with AI if you wish!), edit, and send and schedule custom emails for attendees, speakers, and moderators. Custom emails may include event/session reminders, schedule changes, post event surveys, and more.



 Please note - If your event is based on a custom event template, all branding contained in that template is used in your automated system emails and custom templates.

Automated system emails and custom emails templates - What's the difference?

Kaltura provides three automated **system emails** - Invitation, Registration complete,

and Login.

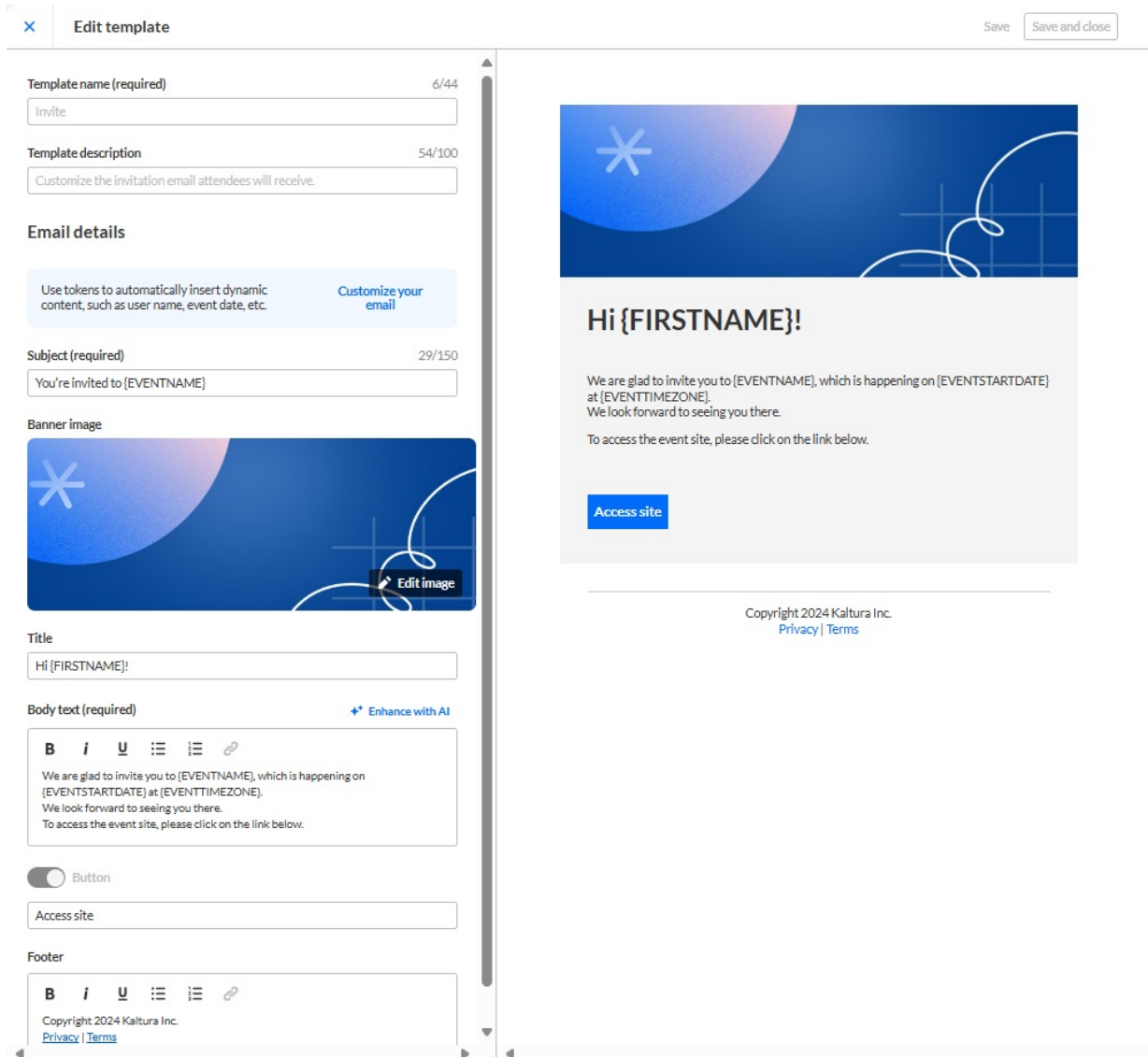
On our preset event templates, Kaltura also provides six **custom email templates** that event organizers can use to build custom emails for prospects, registrants, and attendees. You can edit and use them as basis for your email or create new ones.

- **Spread the word** - Inviting attendees to share content, making it clear that the recordings are available and that the site is open for registration.
- **Upcoming events** - Showcasing the company's upcoming events.
- **Promote content** - Providing extra content regarding the event's subject with a spotlight on the company blogposts, products, etc.
- **Get feedback** - Asking participants for feedback with an external form.
- **Notify your audience** - Attracting registrants to join the event after it has started.
- **Send a reminder** - Raise awareness to the site, calling registrants to check the speakers and agenda, wander around and watch some VODs.

Customize the Invitation email (an automated system email)

The "Invitation email" is the email that attendees, speakers, and moderators will receive upon being invited to the event.

1. On the Templates tab, under Automated system emails, click **Edit** in the Invite box. The Edit Invitation Email page displays.




2. Edit the appropriate fields.

The editable fields in the Edit Invitation Email page are as follows. A preview of the Invitation Email is displayed on the right of your screen and updates in real time as you make your changes.


- Subject (required) - Type a subject for your email.
- Banner image - If you wish to upload an image, click **Upload image** and choose the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.
- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.

You may also use AI to modify the body text. Simply click the blue **AI button** and additional options display. Clicking on any of the options modifies the email accordingly.

- Add changes - Produces a different version with your specified changes.
- Rewrite - Produces a different version of the same content.
- Shorter - Creates a shorter version of the same content.
- Longer - Creates a longer version of the same content.
- More formal - Edits current content to a more formal writing style.
- More casual - Edits the current content to a more casual writing style.

 Looking for more information about this feature? Feel free to contact your Kaltura representative.

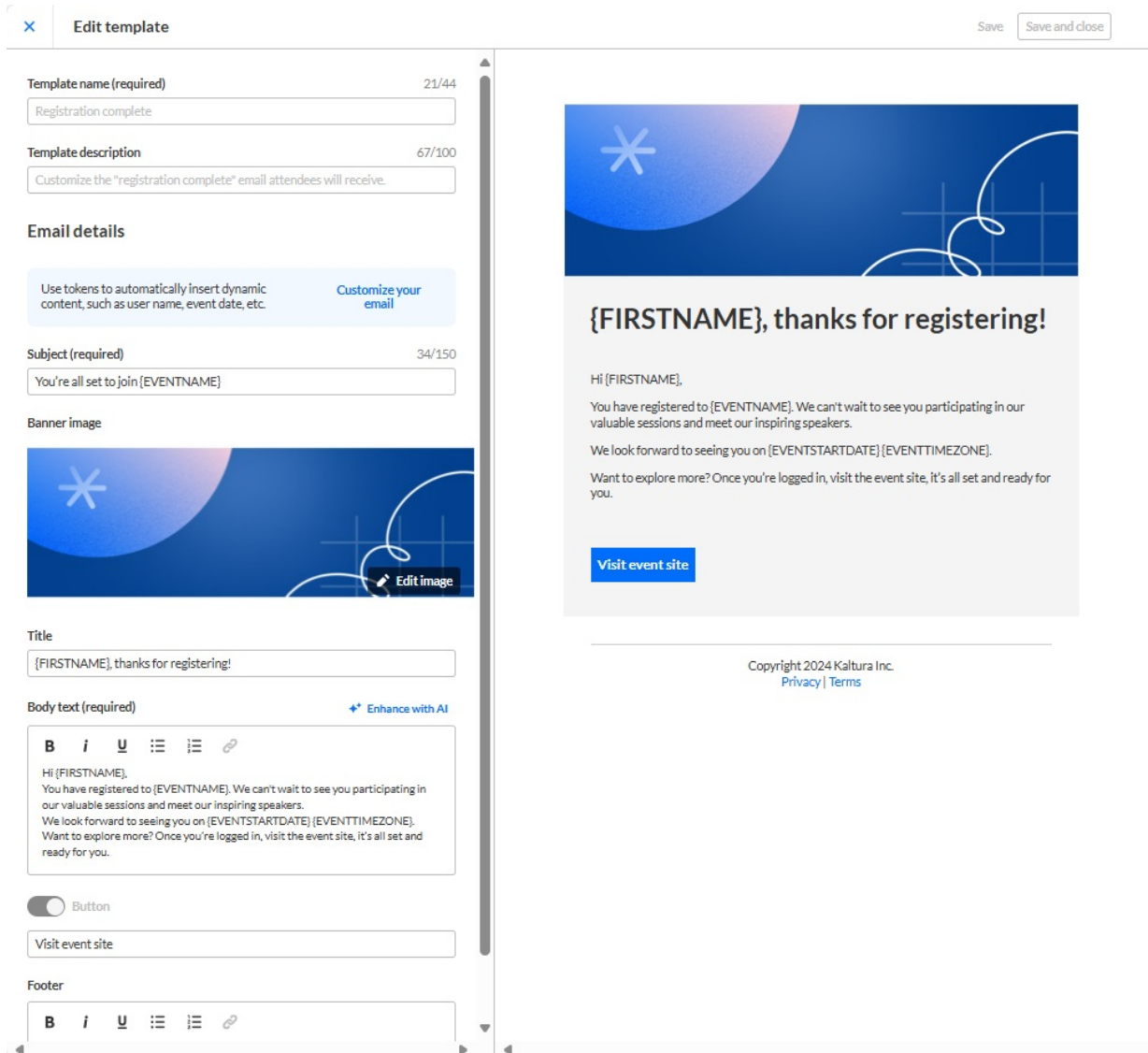
- Button Label - Type text that will display on the button.
 - Footer - Type the text that will display on the email footer.
3. Once you are finished editing the Invitation email, click **Save** to save and remain on the page or **Save and Close** to save and exit the page. A notification that the email template was updated successfully is displayed.

 Note that you cannot edit Template name or Template description. These fields have been set in advance by Kaltura.

Customize the Registration complete email (an automated system email)

The "Registration complete email" is the email that attendees will receive upon completing the registration.

1. On the Templates tab, under Automated system emails, click **Edit** in the Registration complete box. The Edit Registration Complete Email page displays.



2. Edit the appropriate fields.

The editable fields in the Edit Registration Complete Email page are as follows. A preview of the Registration Complete Email is displayed on the right of your screen and updates in real time as you make your changes.

- Subject (required) - Type a subject for your email.
- Banner image - If you wish to upload an image, click **Upload image** and choose the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.
- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.


You may also use AI to modify the body text. Simply click the blue **AI button** and additional options display. Clicking on any of the options modify the email accordingly.

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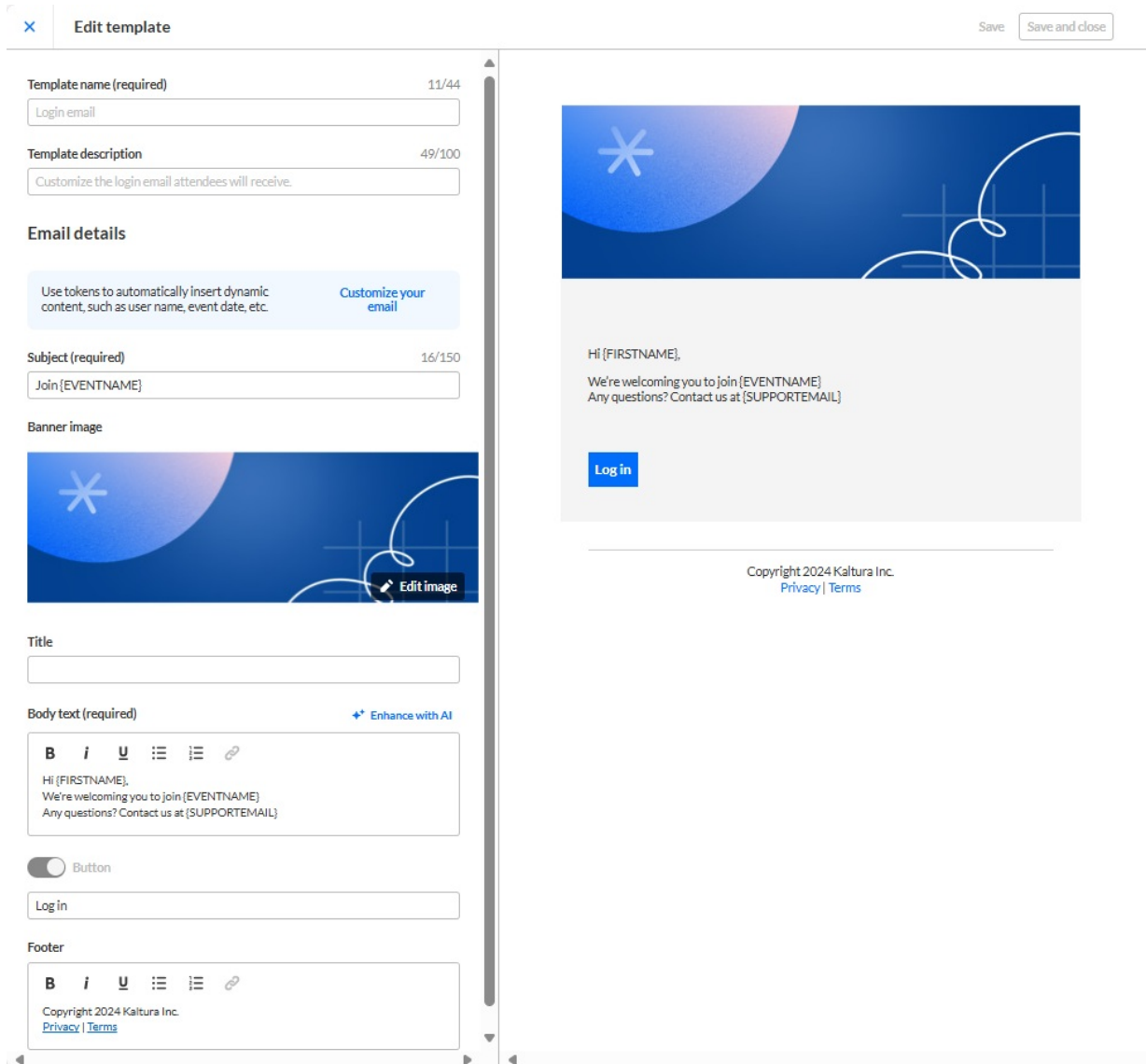
- Button Label - Type text that will display on the button.
 - Footer - Type the text that will display on the email footer.
3. Once you are finished editing the Registration Complete email, click **Save** to save and remain on the page or **Save and Close** to save and exit the page. A notification that the email template was updated successfully is displayed.

 Note that you cannot edit Template name or Template description. These fields have been set in advance by Kaltura.

Customize the Login email (an automated system email)

The "Login" email is the email that attendees will receive when trying to log in to the event site. To learn more about your event site, see [Getting to know your event site, session page, and lobby page](#).

1. On the Templates tab, under Automated system emails, click **Edit** in the Login Email box. The Edit Login Email page displays.




2. Edit the appropriate fields.

The editable fields in the Edit Login Email page are as follows. A preview of the Login Email is displayed on the right of your screen and updates in real time as you make your changes.


- Subject (required) - Type a subject for your email.
- Banner image - If you wish to upload an image, click **Upload image** and choose the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.
- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.

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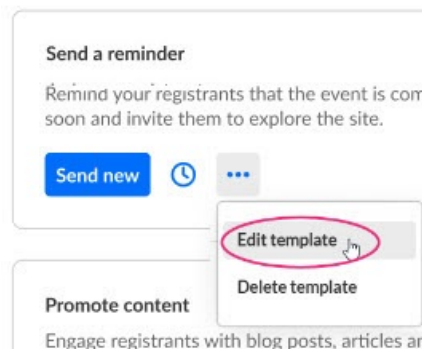
 Looking for more information about this feature? Feel free to contact your Kaltura representative.

- Button Label - Type text that will display on the button.
 - Footer - Type the text that will display on the email footer.
3. Once you are finished editing the Login email, click **Save** to save and remain on the page or **Save and Close** to save and exit the page. A notification that the email template was updated successfully is displayed.

 Note that you cannot edit Template name or Template description. These fields have been set in advance by Kaltura.

Edit a custom email template

1. On the Templates tab, under Custom templates, choose Edit template from the three-button menu located in the desired custom email box to edit the custom template before sending.



The Edit Custom Template page displays. In the example below, we have chosen to edit the **Send a reminder** template.

✕ Edit template
Save

Template name (required) 8/44

Template description 80/100

Email details

Use tokens to automatically insert dynamic content such as user name, event date, etc. [Customize your email](#)

Subject (required) 40/150

Banner image

Recommended size: 1200x400 px

[Upload image](#)

Title

Body text (required) ✚

B ***i*** **U** **☰** **☰** **🔗**

Dear [FIRSTNAME] [LASTNAME],

We're thrilled to invite you to the upcoming [EVENTNAME], taking place on [EVENTSTARTDATE] [EVENTTIMEZONE]. Get ready for an unforgettable journey through the best moments from the iconic first season of Seinfeld!

During this virtual event, we'll explore memorable episodes, classic scenes, and beloved quotes that made Seinfeld a cultural phenomenon. Join fellow fans as we share laughs and engage in lively discussions about the genius of Jerry, George, Elaine, and Kramer. And as a special treat, Eli Copter, the leading expert in the field, will be joining us for a surprise talk you won't want to miss!

Don't miss out on this nostalgic celebration of the beginnings of Seinfeld. We can't wait to see you there!

Button

Footer

B ***i*** **U** **☰** **☰** **A** **🔗**

Add footer content

Upload image

Recommended size: 1200x400 px

Join us for the {EVENTNAME}

Dear {FIRSTNAME} {LASTNAME},

We're thrilled to invite you to the upcoming [EVENTNAME], taking place on [EVENTSTARTDATE] [EVENTTIMEZONE]. Get ready for an unforgettable journey through the best moments from the iconic first season of Seinfeld!

During this virtual event, we'll explore memorable episodes, classic scenes, and beloved quotes that made Seinfeld a cultural phenomenon. Join fellow fans as we share laughs and engage in lively discussions about the genius of Jerry, George, Elaine, and Kramer. And as a special treat, Eli Copter, the leading expert in the field, will be joining us for a surprise talk you won't want to miss!

Don't miss out on this nostalgic celebration of the beginnings of Seinfeld. We can't wait to see you there!

[Attend the Event](#)


2. Edit the appropriate fields. A preview of the custom email template is displayed on the right of your screen and updates in real time as you make your changes. You may click **Customize your email** in the Email details section to see a list of customization tokens that you may copy and paste into fields to customize your email template.
 - Template name (required) - Type a name for your template.
 - Template description - Type a description of your template.
 - Subject (required) - Type a subject for your email.
 - Banner image - If you wish to upload an image, click **Upload image** and choose

the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.


- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.

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 Looking for more information about this feature? Feel free to contact your Kaltura representative.

- Button - Click to enable use of a button in the email. When users press this button, they are redirected to the configured location.
- Button Label - Type text that will display on the button.
- Button URL - Type the URL your user will be redirected to when they push the button.

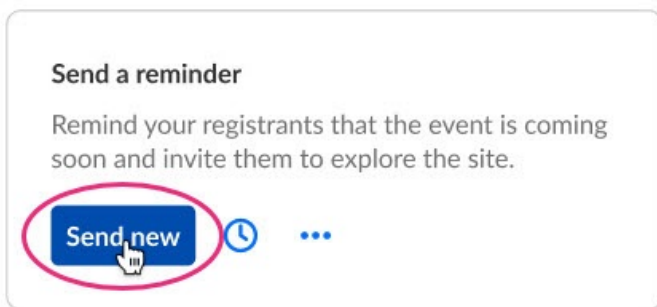
 When using a login link for entrance into the event, Kaltura recommends adding the "MAGICLINK" customization token as the button URL so that your attendees can directly login and have a seamless experience.

- Footer - Type the text that will display on the email footer.

3. Once you are finished editing the custom email, click **Save** to save and remain on the page or **Save and Close** to save and exit the page. A notification that the email template was updated successfully is displayed.

Send a custom email now

1. On the Templates tab, under Custom templates, click **Send new** in the desired custom email box to prepare to send the custom email.



The Send now screen displays. In the example below, we have chosen to send a reminder email.

Notice the toggle buttons available for Email delivery time. Because you clicked on the Send now button, "Send now" is selected by default. If you would like to abandon sending this email now and, instead, schedule it to be sent at another time, click Schedule to navigate back to the Schedule screen. We will learn more about scheduling emails [later in this article](#).

Send a reminder
Email

Send test email

[Send now](#)

From

Virtually Live

Email

.....com

To

Advanced list

All

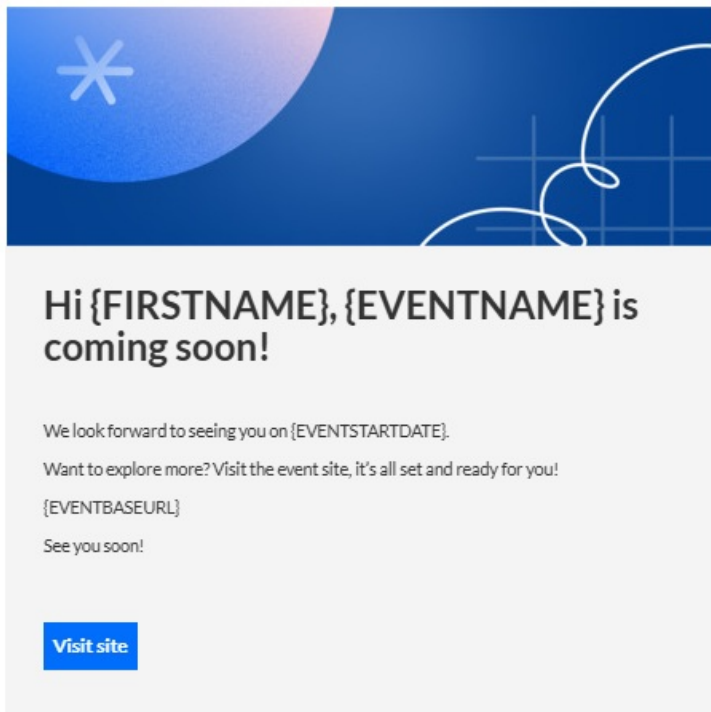
Email delivery time

[Send now](#)

[Schedule](#)

Subject - {FIRSTNAME}, {EVENTNAME} is almost here!

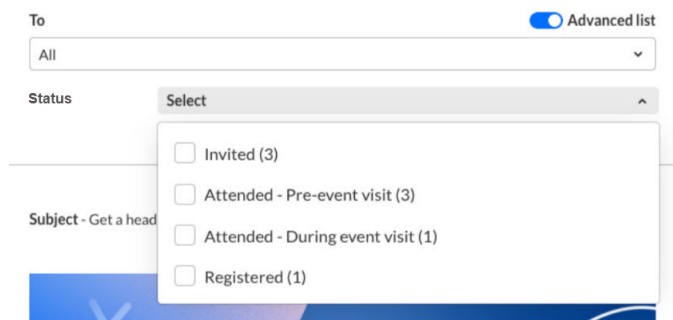
[Edit template](#)



Extraordinary events, every day
[Kaltura Events](#) | [Contact us](#) | [Unsubscribe](#)

2. In the From field, type the sender name. Note - It is prefilled with the event name. You can change or remove this text.
3. From the To pull-down list, select who will receive the custom email - All, Speakers, Moderators, or No show users. If you selected All or No show users, you also have the option of choosing from a more advanced list of users, thereby streamlining communication with specific audience segments. In other words, sending relevant content to your relevant audience based on their attendance status. Slide the **Advanced list** button to the right and another option displays - Registration status. Click the down arrow to expand the Registration status list and click on

desired status(es).



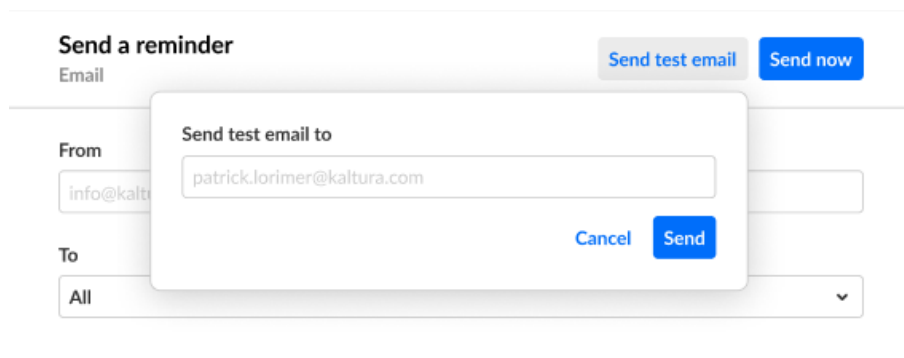
The statuses listed reflect the granularity seen upon hovering over the registration status of a user in the All users page. For detailed information on these statuses, see [People tab > All users - Invite attendees to your event](#).

Following are a couple examples when you may choose to use the Advanced list option:


You want to send an email to all those who *attended* your event, thanking them for coming. Choose **Attended - During event visit**.

You want to send an email to those who were *invited and/or registered but did not attend*, telling them they were missed and directing them to the recording. Choose **Invited** and **Registered**.

4. If you would like to send a test email to yourself to check the appearance, click **Send test email**, then click **Send**.

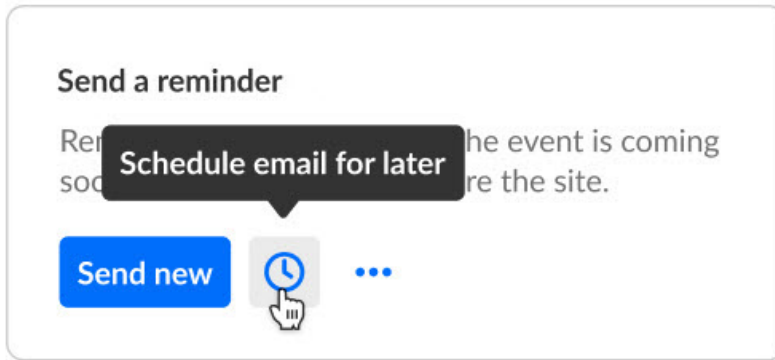


5. After you've received the test email and are satisfied with the appearance, click **Send now** to send the email to your recipients. A notification that the email was sent successfully is displayed.

 If you would like to edit the custom template, simply click the **Edit template** button and follow the steps in [Edit a Custom Template](#).

Schedule a custom email to be sent at another time

1. On the Templates tab, under Custom templates, click the **Schedule email for later** "clock" icon button in the desired custom email box to schedule the custom email.



The Schedule screen displays. In the example below, we have chosen to schedule a reminder email.

Notice the toggle buttons available for Email delivery time. Because you clicked on the Schedule email for later button, "Schedule" is selected by default. If you would like to abandon scheduling the email and, instead, send it now, click Send now to navigate back to the Send now screen.

Send a reminder
Email

Send test email

[Schedule](#)

From

DIY Test A

Email

sender@test.nvq2.ovp.kaltura.com

To

All

Advanced list

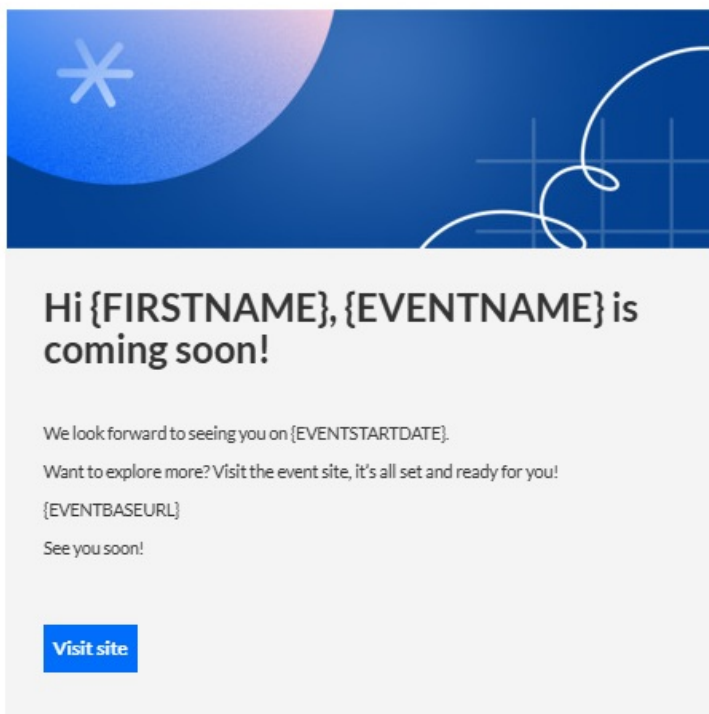
Email delivery time

Send now

[Schedule](#)

Subject - {FIRSTNAME}, {EVENTNAME} is almost here!

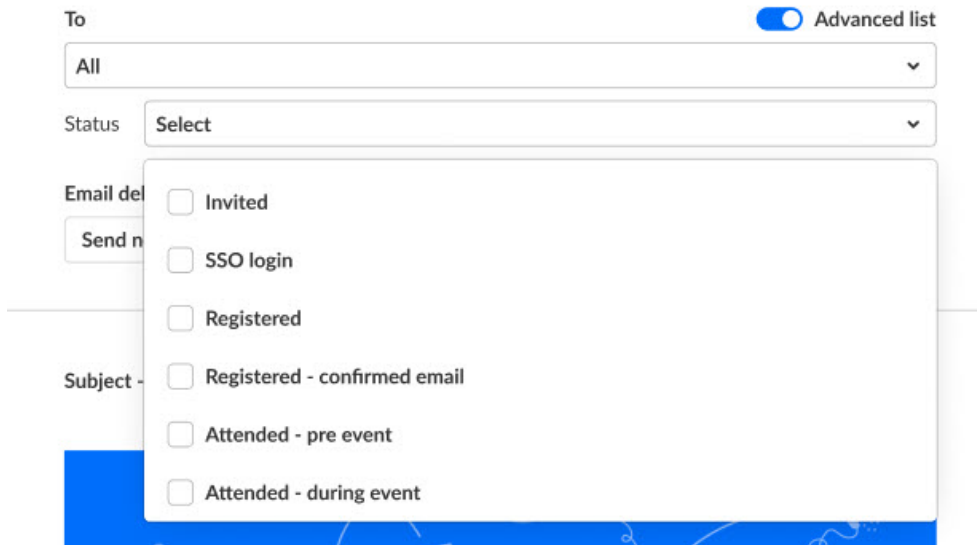
[Edit template](#)



Extraordinary events, every day
[Kaltura Events](#) | [Contact us](#) | [Unsubscribe](#)

2. In the From field, type the sender name. Note - It is prefilled with the event name. You can change or remove this text.
3. From the To pull-down list, select who will receive the scheduled custom email - All, Speakers, Moderators, or No show users. If you selected All or No show users, you also have the option of choosing from a more advanced list of users, thereby streamlining communication with specific audience segments. In other words, sending relevant content to your relevant audience based on their attendance status. Slide the **Advanced list** button to the right and another option displays - Registration status. Click the down arrow to expand the Registration status list and

click on desired status(es).



The statuses listed reflect the granularity seen upon hovering over the registration status of a user in the All users page. For detailed information on these statuses, see [People tab > All users - Invite attendees to your event](#).

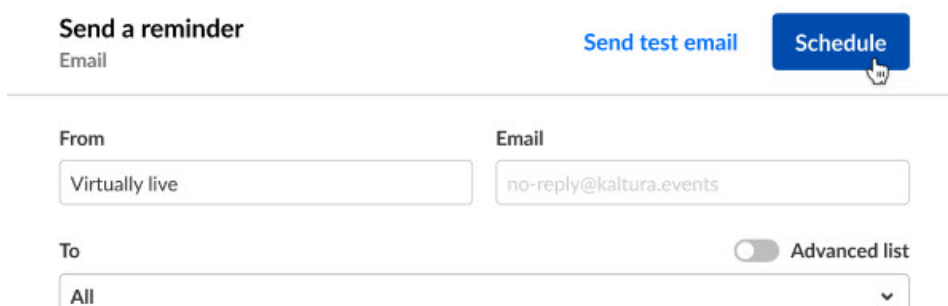
Following are a couple examples when you may choose to use the Advanced list option:

You want to send an email to all those who *attended* your event, thanking them for coming. Choose **Attended - During event visit**.

You want to send an email to those who were *invited and/or registered but did not attend*, telling them they were missed and directing them to the recording. Choose **Invited** and **Registered**.

Notice how the statuses in the advanced list for scheduled emails differ from those available when sending the custom email now. When sending the custom email now, you may choose from *only current statuses*; when scheduling custom emails, you have the ability to choose from *future* statuses as well.

4. Click the **Schedule** button to schedule the email.



The Schedule email screen displays.

Schedule email

Relative to the event
 Select date & time

Schedule email notification ⓘ

the event

Email will be sent on 09/09/24, 10:00 AM EST

[Cancel](#)
[Schedule](#)

- Decide whether you would like to schedule the email relative to the event (i.e., at a chosen amount of time before, into, or after an event), or on a specific date and time.
- If you choose *Relative to the event*, type the number of [days, hours, or minutes, per your selection] and whether this will occur before, after, or into your event. Let's use a few examples. If you want to schedule the reminder email to be sent 2 hours before the event starts, you type **2**, then select **Hours** and **Before**. If you want to schedule the reminder email to be sent 1 day after the event ends, you type **1**, then select **Days** and **After**. If you want to schedule the reminder email to be sent 20 minutes after the start time of the event - you type **20**, then select **Minutes** and **Into**.

Please note that if the event time changes, the email schedule will be adjusted accordingly. In addition, if the event has already started, and you attempt to schedule an email *before the event*, you receive a message that the email must be scheduled in the future.

Schedule email

Relative to the event
 Select date & time

Schedule email notification ⓘ

the event

Email will be sent on 09/09/24, 1

Before
 Into
 After

[Cancel](#)
[Schedule](#)

If you choose *Schedule date & time*, make the appropriate selections for date and time.

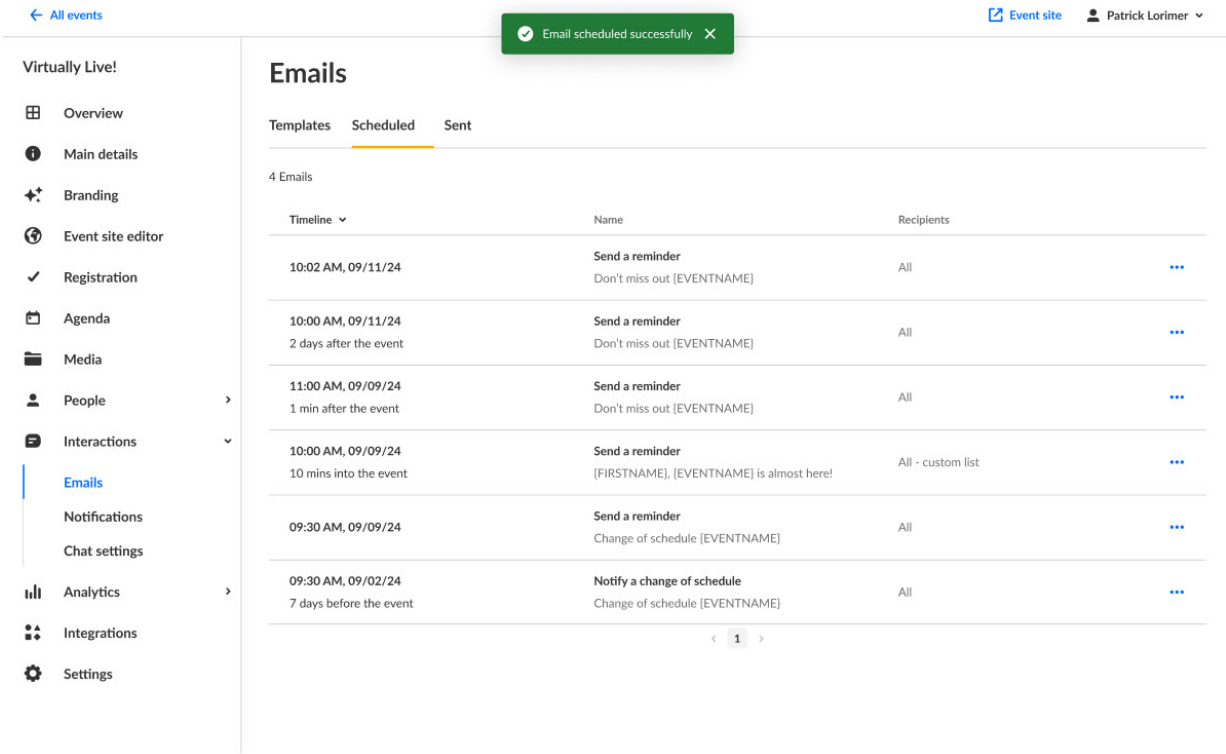
Schedule email

Relative to event
 Select date & time

Email will be sent on 09/09/24, 10:00 AM EST

[Cancel](#)

7. Click **Schedule**. You are redirected to the Scheduled tab. You receive confirmation that the email has been scheduled successfully and it is displayed in the list.



← All events Event site Patrick Lorimer

✔ Email scheduled successfully ✕

Virtualy Live!

- Overview
- Main details
- Branding
- Event site editor
- Registration
- Agenda
- Media
- People
- Interactions
- Emails
- Notifications
- Chat settings
- Analytics
- Integrations
- Settings

Emails

Templates **Scheduled** Sent

4 Emails

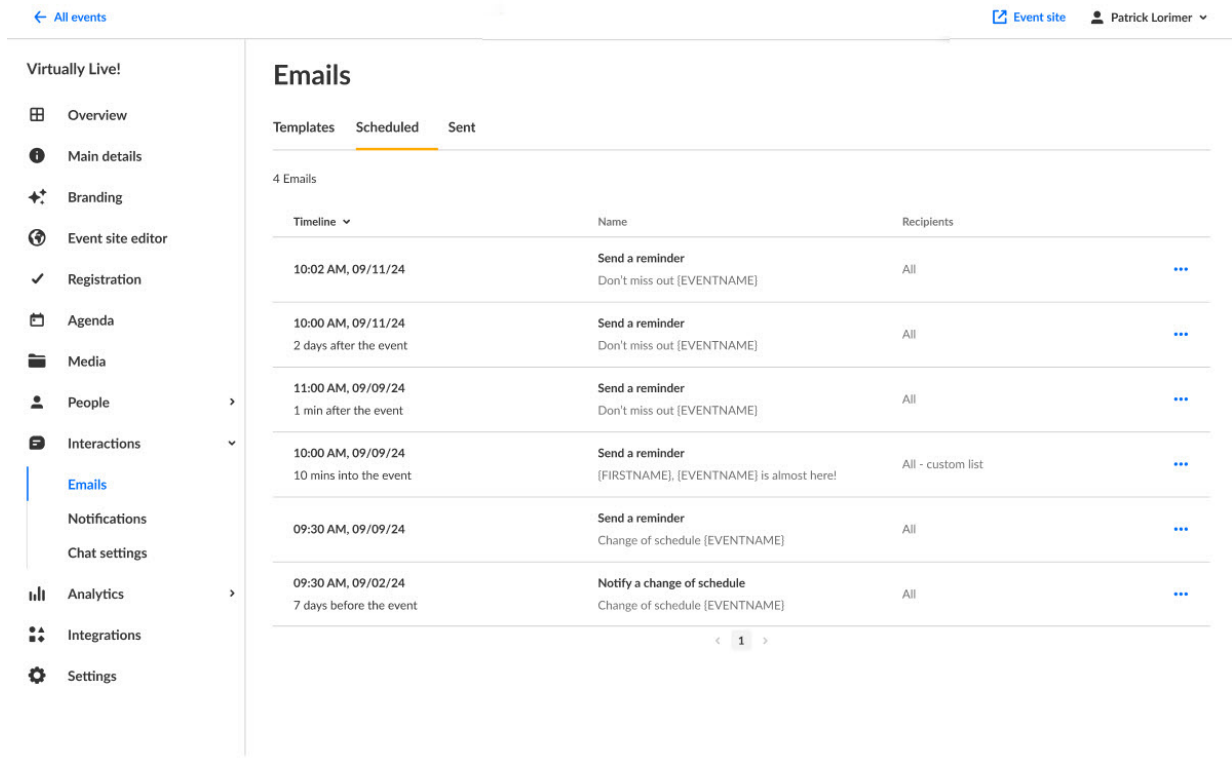
Timeline	Name	Recipients	
10:02 AM, 09/11/24	Send a reminder Don't miss out [EVENTNAME]	All	...
10:00 AM, 09/11/24 2 days after the event	Send a reminder Don't miss out [EVENTNAME]	All	...
11:00 AM, 09/09/24 1 min after the event	Send a reminder Don't miss out [EVENTNAME]	All	...
10:00 AM, 09/09/24 10 mins into the event	Send a reminder [FIRSTNAME], [EVENTNAME] is almost here!	All - custom list	...
09:30 AM, 09/09/24	Send a reminder Change of schedule [EVENTNAME]	All	...
09:30 AM, 09/02/24 7 days before the event	Notify a change of schedule Change of schedule [EVENTNAME]	All	...

< 1 >

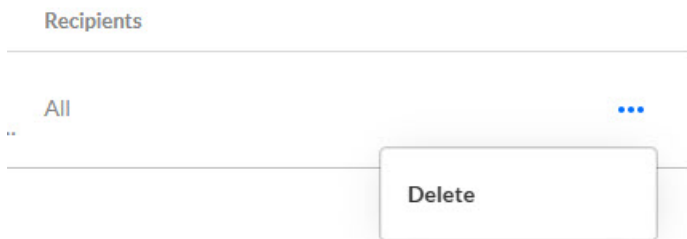
Delete a scheduled custom email

You can always delete a scheduled email if you change your mind.

1. Click on the Scheduled tab.



2. Click the three-dot action menu to the right of the desired email and choose Delete.




You are asked to confirm your action. This action can't be undone.

3. Click **Delete email** to confirm or click **Cancel** to exit.

Create a custom email template using AI

Producing content for an event is challenging. Beyond managing session content, there are numerous other details that demand attention to ensure everything runs smoothly. One of those details is managing email notifications. Kaltura's AI-generated email templates make creating or editing your emails much easier and faster!

 Looking for more information about this feature? Feel free to contact your Kaltura representative.

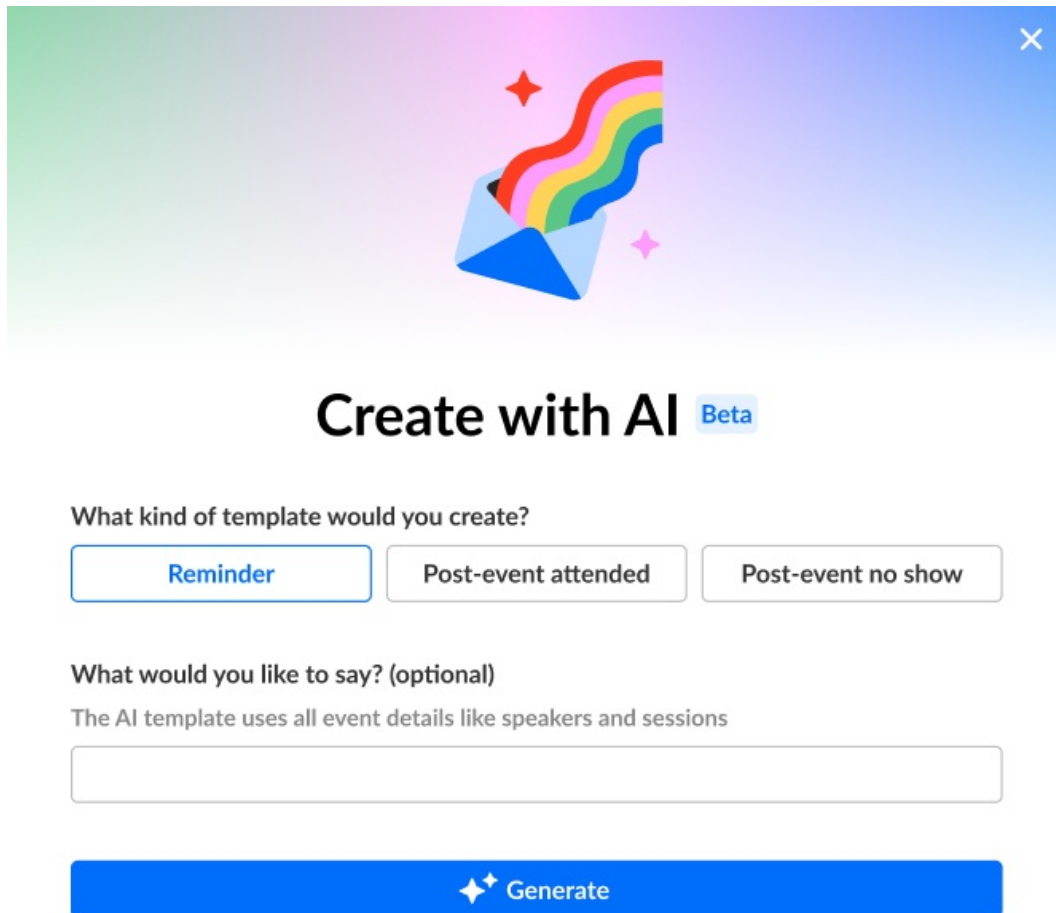
 This feature supports English language only.

1. On the Templates tab, under Custom templates, click **Create with AI**.

✦✦ Create with AI + Create new

on)
Spread the word
Encourage attendees to share the event content and remind them that it's available on-demand.

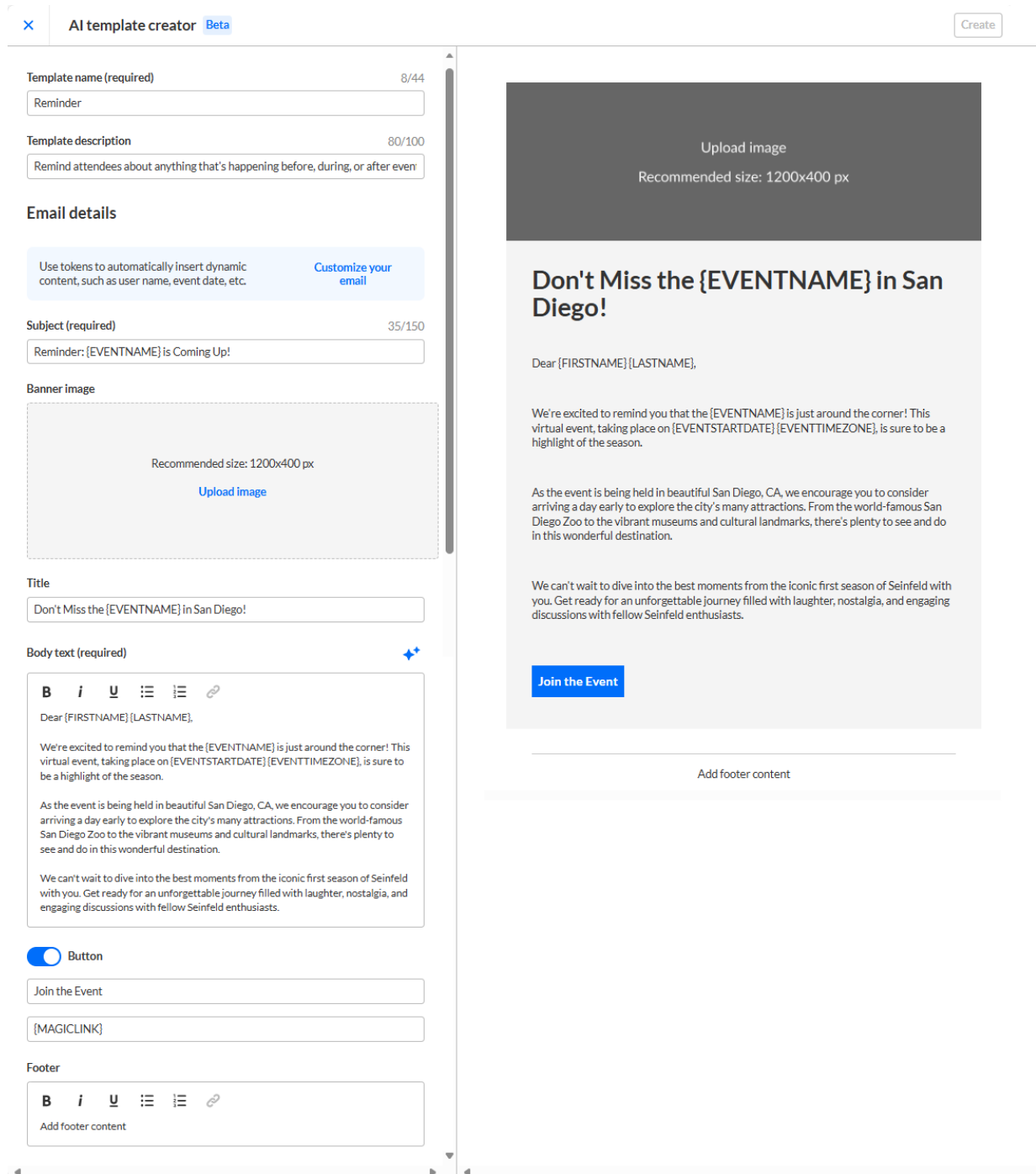
The Create with AI screen displays.



2. Decide what kind of template you would like to create.
 - a. Reminder - Remind attendees about anything that's happening before and/or during the event.
 - b. Post-event attended - Engage with attendees right after the event is over.
 - c. Post-event no show - Engage with registrants that didn't attend the event.
3. Type anything else you would like included in the email. This is an optional step. The AI template uses all the event details (i.e., speakers, sessions, etc.), but this is your time to provide additional context. For instance, if your event is taking place in San Diego, CA, you may want to type something like "Mention that because the event is taking place in San Diego, CA and there's so many fun things to do and see in San Diego like the world-famous zoo and museums, attendees may want to arrive a day

early."

4. Click **Generate**. You are redirected to the AI template creator page.



5. At this point you can edit what's already filled in, as well as add more to your email template. A preview of the new template is displayed on the right of your screen and updates in real time as you make your changes.

You may click **Customize your email** in the Email details section to see a list of customization tokens that you may copy and paste into fields to customize your email template.


- o Template name (required) - Type a name for your template. The Template name

is pre-filled based on the kind of template you selected.


- Template description - Type a description of your template. Notice the Template description is pre-filled based on the kind of template you selected.
- Subject (required) - Type a subject for your email.
- Banner image - If you wish to upload an image, click **Upload image** and choose the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.
- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.

You may also use AI to modify the body text. Simply click the blue **AI button** and additional options display. Clicking on any of the options modify the email accordingly.

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- More casual - Edits the current content to a more casual writing style.

 Looking for more information about this feature? Feel free to contact your Kaltura representative.

- Button - Click to enable use of a button in the email. When users press this button, they are redirected to the configured location.
- Button Label - Type text that will display on the button.
- Button URL - Type the URL your user will be redirected to when they push the button.

 When using a login link for entrance into the event, Kaltura recommends adding the "MAGICLINK" customization token as the button URL so that your attendees can directly login and have a seamless experience.

- Footer - Type the text that will display on the email footer.

6. Once you are finished, click **Create** to save it. A notification that the custom email template was created successfully is displayed.

Create a custom email template on your own

1. On the Templates tab, under Custom templates, click **Create new**.

[Create with AI](#)
[+ Create new](#)

on)

Spread the word
Encourage attendees to share the event content and remind them that it's available on-demand.

The Create new template page displays.

✕ New template
Create

Template name (required) 0/44

Template description 0/100

Upload image
Recommended size: 1200x400 px

Add title

It's time to create your own email!

Hi {FIRSTNAME},
This where you can write the intro of your email and explain your audience why they get this message.

Elaborate more and give context to your attendees. You can also use tokens to personalize this email, we know people love that!

Make sure to end this email with a clear call-to-action. You can add a CTA button to lead your attendees to the relevant link or finish this email with a warm closing paragraph. Don't forget to add text in the email footer, where you can also share links to your website and social links.

Add footer content

Email details

Use tokens to automatically insert dynamic content, such as user name, event date, etc. [Customize your email](#)

Subject (required) 0/150

Banner image

Recommended size: 1200x400 px
[Upload image](#)

Title

Body text (required) ✦✦

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It's time to create your own email!

Hi {FIRSTNAME},
This where you can write the intro of your email and explain your audience why they get this message.

Elaborate more and give context to your attendees. You can also use tokens to personalize this email, we know people love that!

Make sure to end this email with a clear call-to-action. You can add a CTA button to lead your attendees to the relevant link or finish this email with a warm closing paragraph. Don't forget to add text in the email footer, where you can also share links to your website and social links.

Button

Footer

B ***i*** **U** **☰** **☷** [🔗](#)

Add footer content

- Fill in the appropriate fields. The editable fields in the Create new template page are as follows. A preview of the new template is displayed on the right of your screen and updates in real time as you make your changes.

You may click **Customize your email** in the Email details section to see a list of

customization tokens that you may copy and paste into fields to customize your email template.


- Template name
- Template description - Type a description of your template.
- Subject (required) - Type a subject for your email.
- Banner image - If you wish to upload an image, click **Upload image** and choose the desired file. Recommended size is 1920x1080 px. You may click **Edit image** to choose a different one.
- Title - Type a title for your email.
- Body text (required) - Type the message for the body of the email. Some tips are provided for creating a powerful email.

You may also use AI to modify the body text. Simply click the blue **AI button** and additional options display. Clicking on any of the options modify the email accordingly.

- Add changes - Produces a different version with your specified changes.
- Rewrite - Produces a different version of the same content.
- Shorter - Creates a shorter version of the same content.
- Longer - Creates a longer version of the same content.
- More formal - Edits current content to a more formal writing style.
- More casual - Edits the current content to a more casual writing style.

 Looking for more information about this feature? Feel free to contact your Kaltura representative.

- Button - Click to enable use of a button in the email. When users press this button, they are redirected to the configured location.
- Button Label - Type text that will display on the button.
- Button URL - Type the URL your user will be redirected to when they push the button.

 When using a login link for entrance into the event, Kaltura recommends adding the "MAGICLINK" customization token as the button URL so that your attendees can directly login and have a seamless experience.

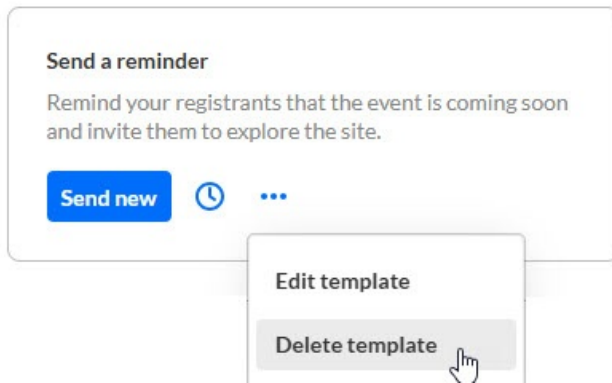
- Footer - Type the text that will display on the email footer.

3. Once you are finished, click **Create** to save it. A notification that the custom email template was created successfully is displayed.

Delete a custom email template

1. On the Templates tab, under Custom templates, choose Delete Template from the three-button menu located in the desired custom email box to delete the custom

template.



2. You are asked to confirm your action. This action can't be undone. Click **Delete permanently** to confirm or click **Cancel** to exit.

[template("cat-subscribe")]
