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Manage Notification Templates (Admin Area)

PUQcloud Panel

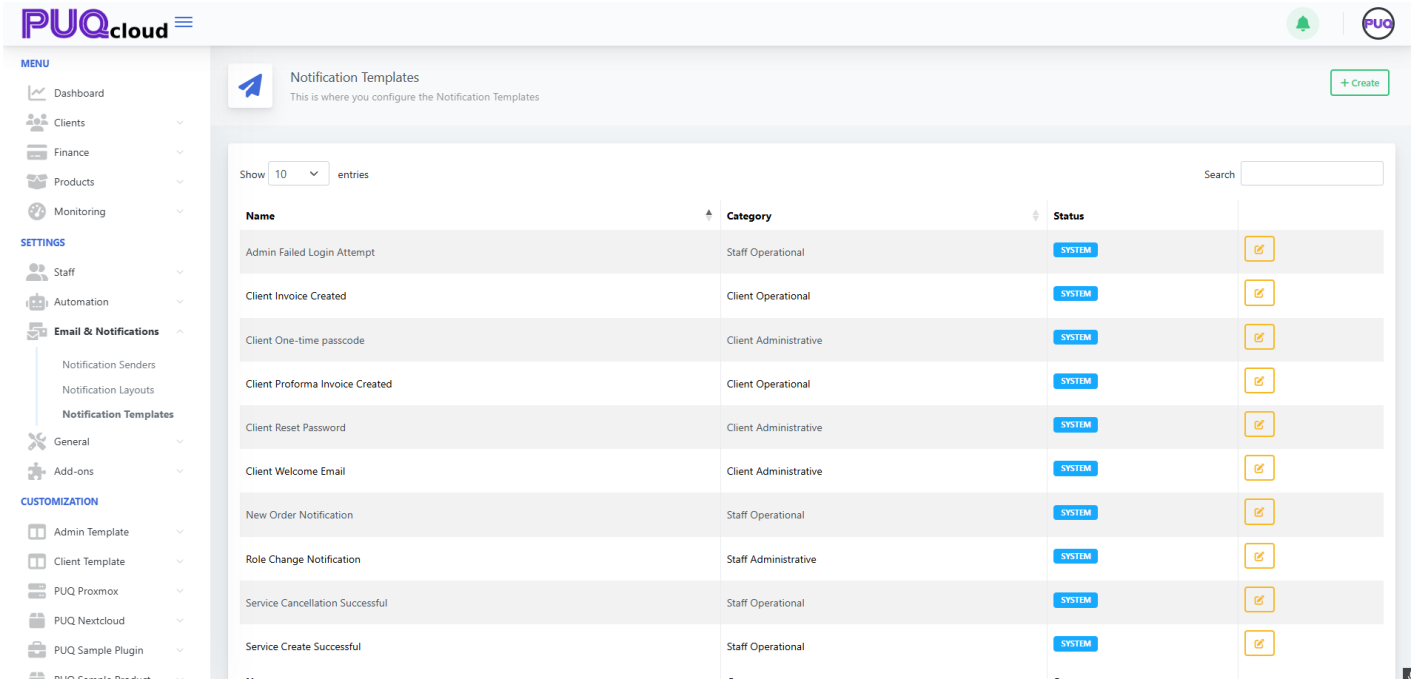
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Here’s a clear, step-by-step guide to managing **Notification Templates** in the Admin Area.

Open the Templates list

- Go to **Email & Notifications → Notification Templates**.
- This page lists all built-in (“**SYSTEM**”) and any custom templates, grouped by category (Staff/Client – Operational/Administrative).
- Use the **Search** box to filter by name and the ✏ **Edit** button to customize a template.

Notification Templates list with categories and edit actions.

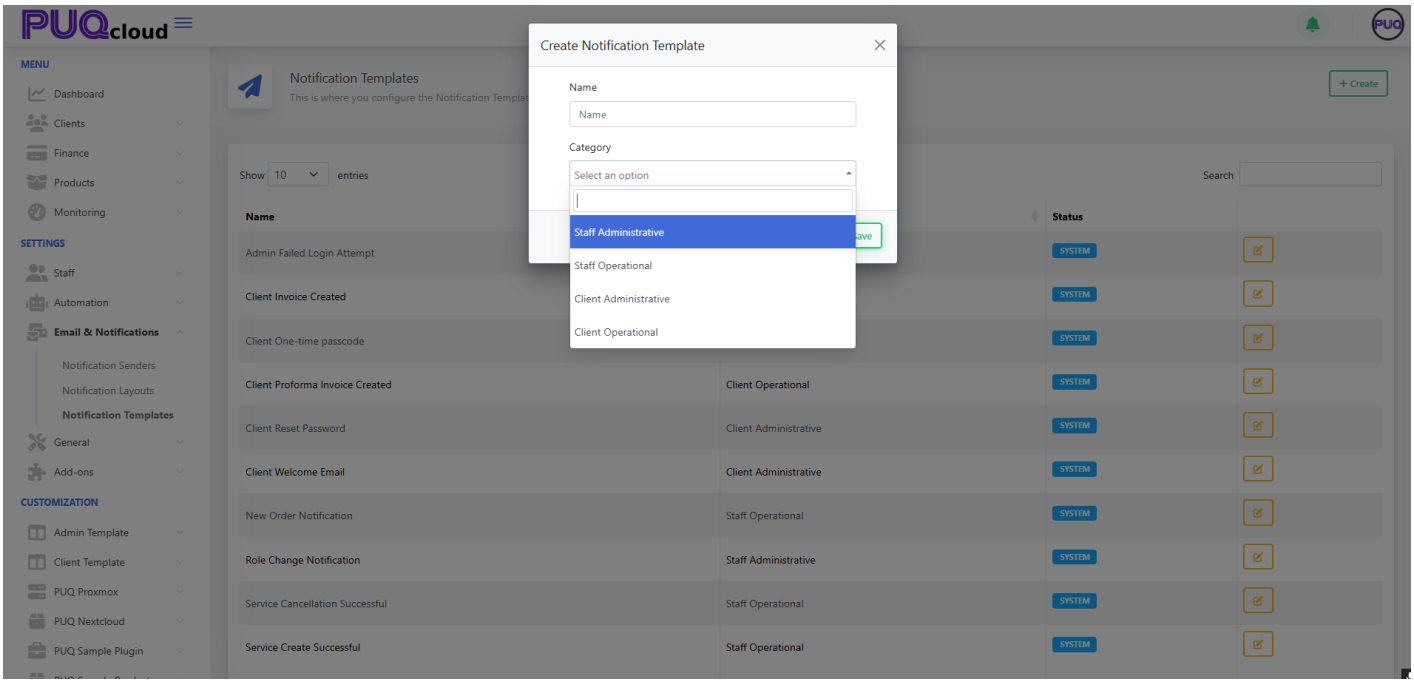


Create a new template

1. Click **+ Create** (top-right).
2. Enter a **Name**.
3. Pick a **Category**:
   - **Staff Administrative**
   - **Staff Operational**
   - **Client Administrative**
   - **Client Operational**
4. Click **Save**.

> Tip: Categories help route who receives the message and where it shows up in the UI.

“Create Notification Template” modal (Category).



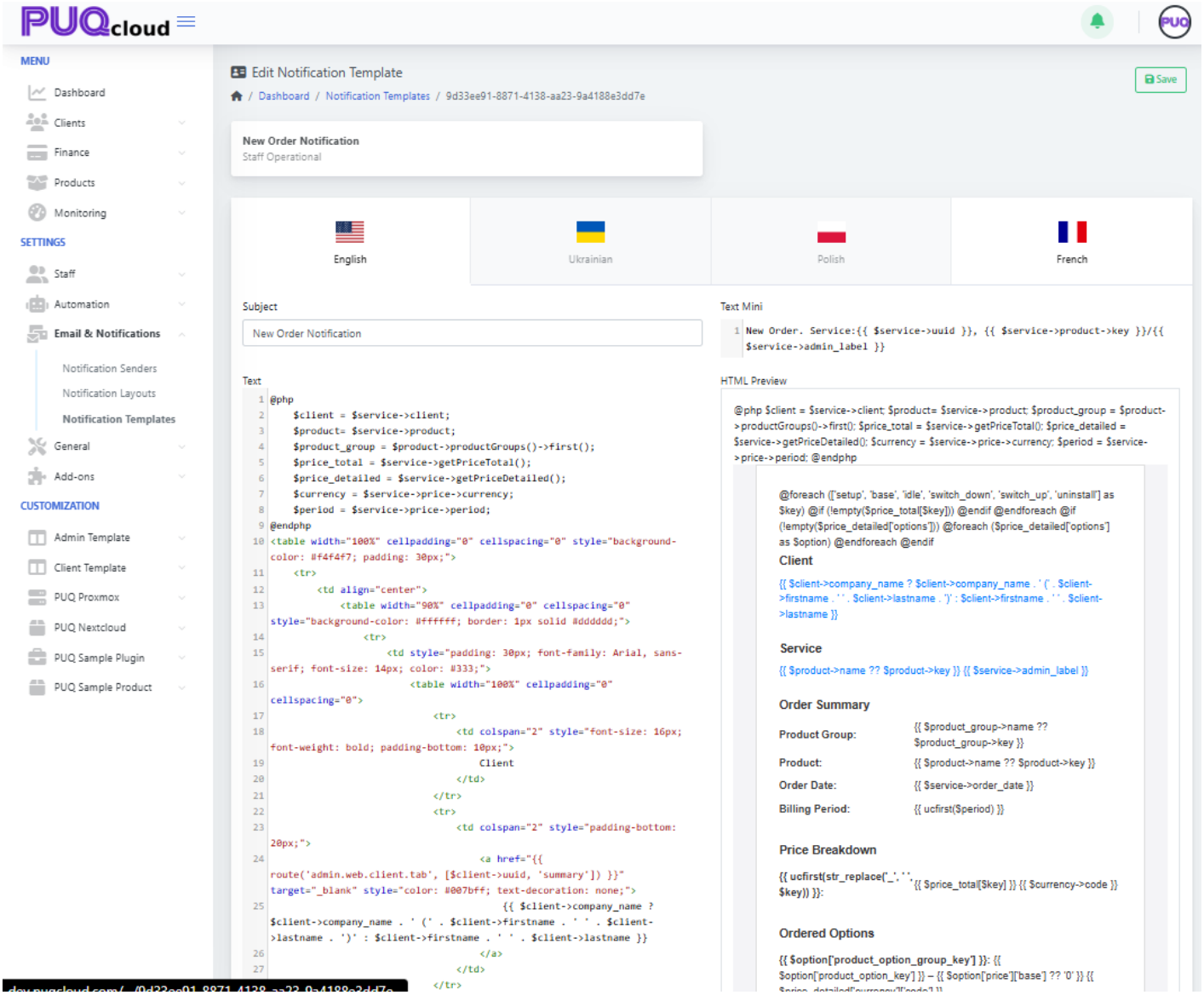
Edit a template (content & languages)

When you edit a template you’ll see:

- **Language tabs** (EN/UA/PL/FR): maintain localized versions for each language you support.
- **Subject**: the email subject line for that language.
- **Text Mini**: a short/plain snippet (great for SMS/push or the top of text-only emails).
- **HTML Preview**: a live preview of the HTML you’re composing on the left.

Changes are independent per language; remember to save after editing each language if you switch tabs.

Edit Notification Template: language tabs, Subject, Text Mini, live preview.



Write the message (variables & logic)

- The editor supports template variables and light blade-style syntax. Common objects include:
  - `$client` (e.g., `$client->company_name`, `$client->firstname`)
  - `$service` (e.g., `$service->uuid`, `$service->price`, `$service->product`)
  - `$product`, `$price_detail`, `$currency`, `$period`, etc., depending on the event
- Use control structures (`@if`, `@foreach`) to conditionally render parts of the email.

Examples you'll often see:

```
{{ $service->uuid }}
```

```
{{ $client->firstname }} {{ $client->lastname }}
@foreach($price_detailed['options'] ?? [] as $option)
  {{ $option['name'] }} — {{ $option['price'] }}
@endforeach
```

- Keep **Text Mini** short and human-readable; reserve full markup for the HTML body.
- Watch the **HTML Preview** on the right to validate your structure and data placeholders.

Best practices

- **Clone behavior:** Editing a SYSTEM template effectively overrides it (your changes become the active version); you can always re-apply defaults later by copying from a fresh environment.
- **Keep it accessible:** Use semantic HTML and inline styles; avoid images for critical info.
- **Localization parity:** Ensure every language tab has at least a basic subject/body.
- **Personalization:** Prefer `$client->firstname` over generic “Dear Customer”.
- **Links & safety:** Use absolute URLs and include a clear **call to action** (e.g., “Visit Client Area”).
- **Testing:** Trigger the real event (e.g., create a proforma invoice) in a sandbox account to see the final message flowing through your selected **Notification Sender** (SMTP/PHPMail/Bell).

Troubleshooting

- **Variables show blank:** That variable isn’t available for the event. Inspect other defaults for that event to see which fields are used.
- **Rendering issues:** Check unclosed tags and preview; simplify nested tables if needed.
- **Wrong language sent:** Confirm the client’s preferred language and that the localized version exists.

Related setup (optional but recommended)

- Configure **Email & Notifications → Notification Senders** (SMTP, PHPMail, Bell) so mail actually goes out.
- Adjust **Notification Layouts** if you want a shared header/footer or branding that wraps your templates.

That’s it—you’re ready to create polished, localized notifications that fit your brand and workflows.

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