



Kinetic

Word Processing

Word Templates and Email Word Templates

2026

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Word Templates

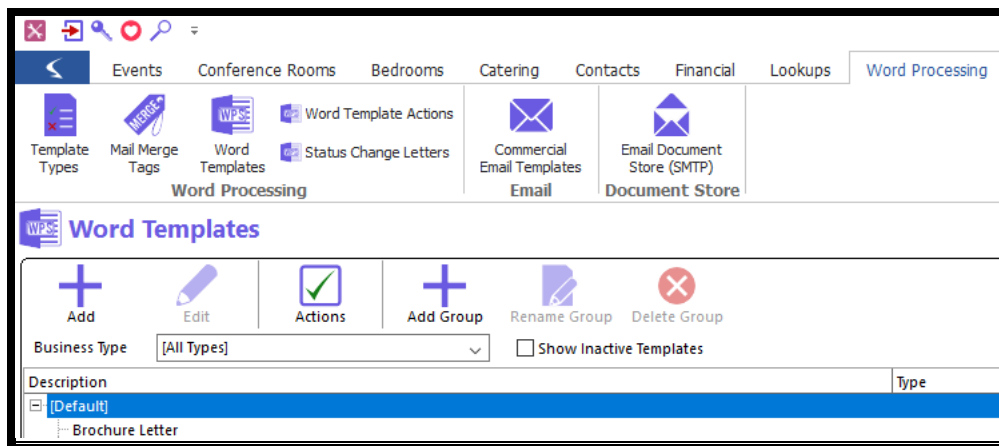
The 2 types of 'Email' templates that need to be configured are:

- Commercial Email Templates
- Word Templates

Commercial Email Templates

Commercial email templates are set up in conjunction with the Email option attached to reports (e.g. booking contract). These templates can only be used when email reports and will not work with any other type of mailings (such as Correspondence tab in an event).

Within the Word Processing tab you have an option to set up Word Templates (for both Letters and Email templates)

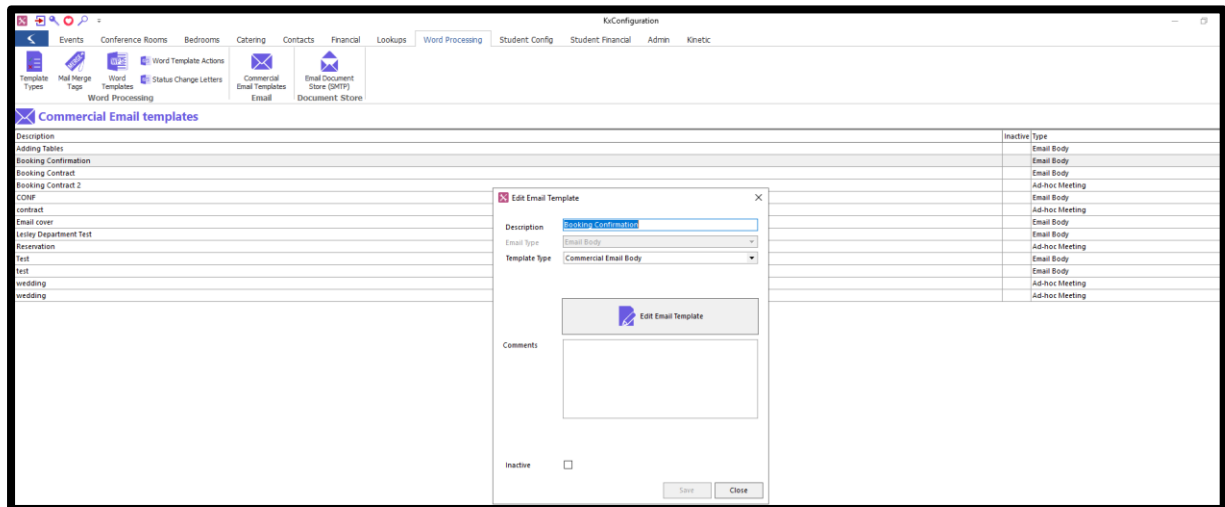


And the Commercial Email Templates, which are for the email option when sending reports/Booking Contract

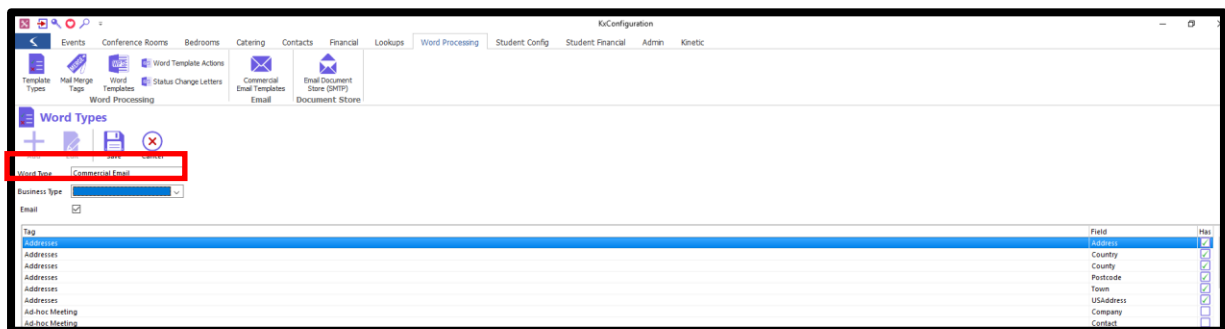
To set up a Commercial Email Template, Select the option 'Commercial Email Templates', and then 'Add'



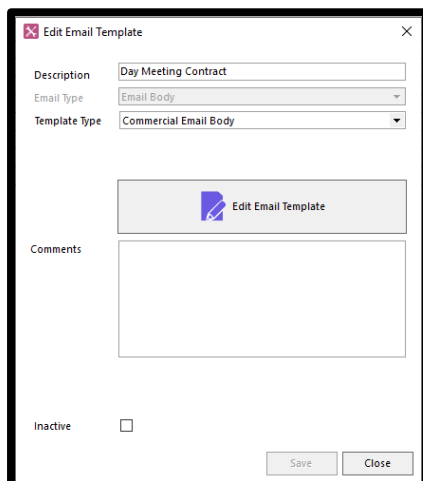
Enter the name of the template (this is used when selecting which template you are sending)



Ensure that the Template Type is set up (this determines which mail merge tags are used) and that the Template Type is linked to the *Commercial Email Template Type* when added.



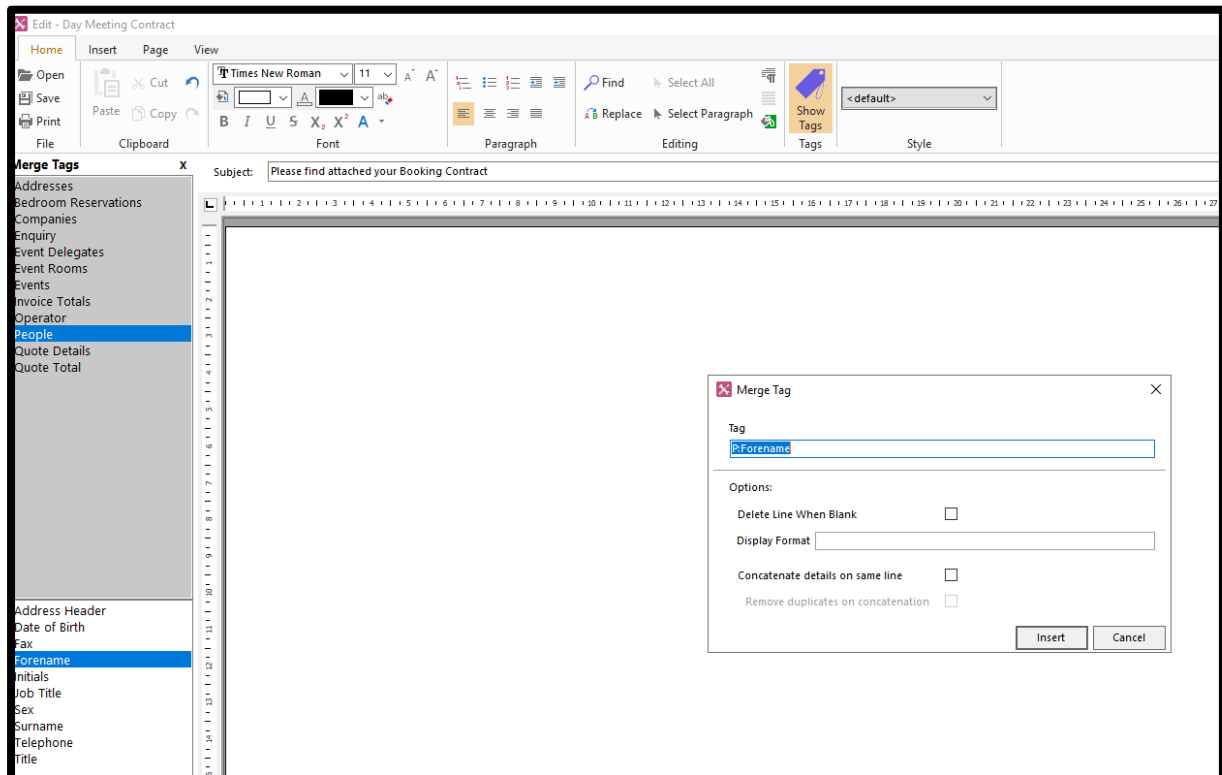
Click Save, and Edit Email Template



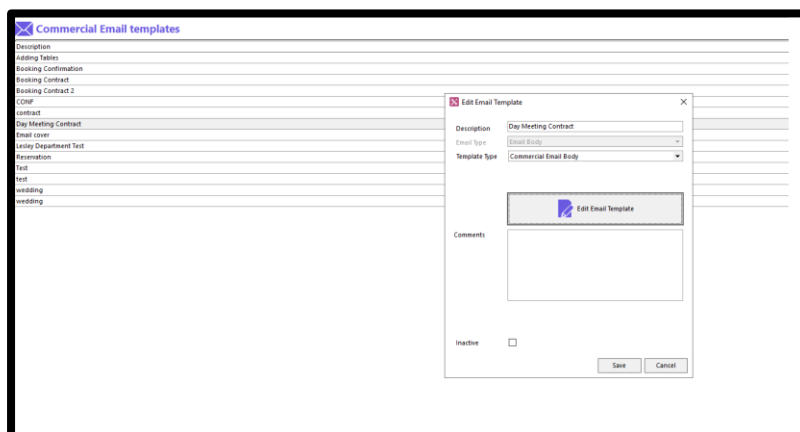
The template design is now open. Each merge tag is displayed down the left-hand side, click the merge tag you wish to use. To do this, first select the option within the grey box, and then the corresponding merge tag within the white box. A dialogue box will pop open; you can click insert to place it on the document.

Continue with this process until you have completed the template.

Please note: The subject line needs to have text for the email to sent



To save the template, click the 'X' at the top right of the page. You will be returned to the list of templates where you can now save your new template

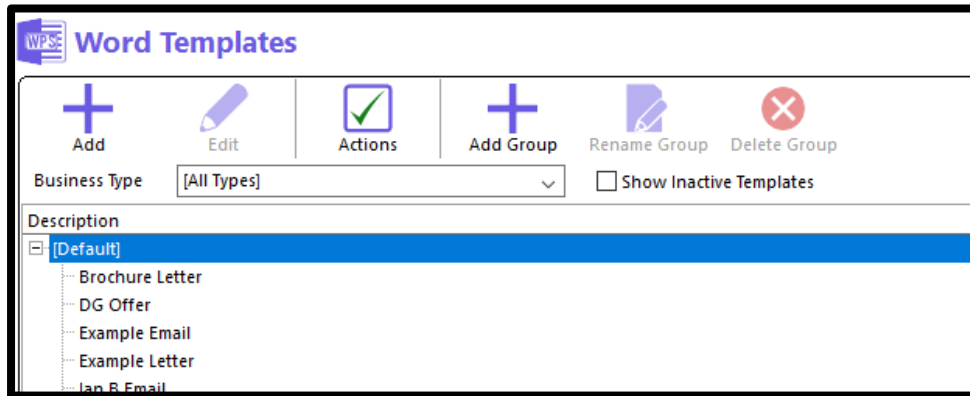


Word Processing > Email Templates

Word processing email templates are designed to be used as Mailings and would therefore, typically be used within the *Mailings* tab of an Event.

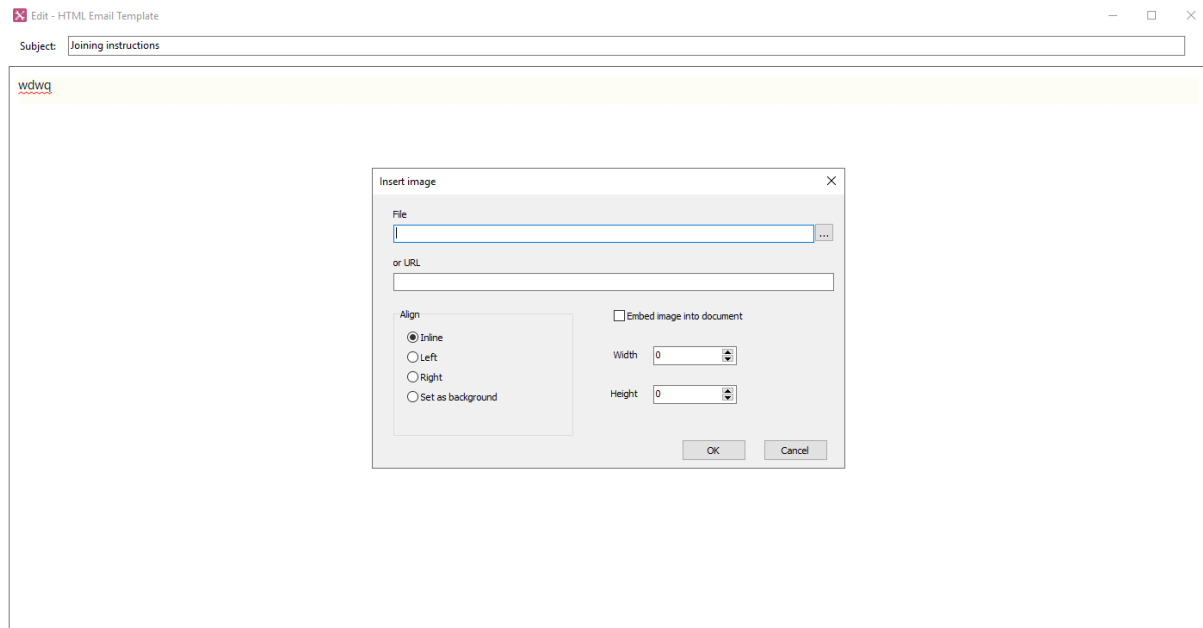
From the Word Processing tab – select – Word Templates.

Click Add – select Add HTML Email Template

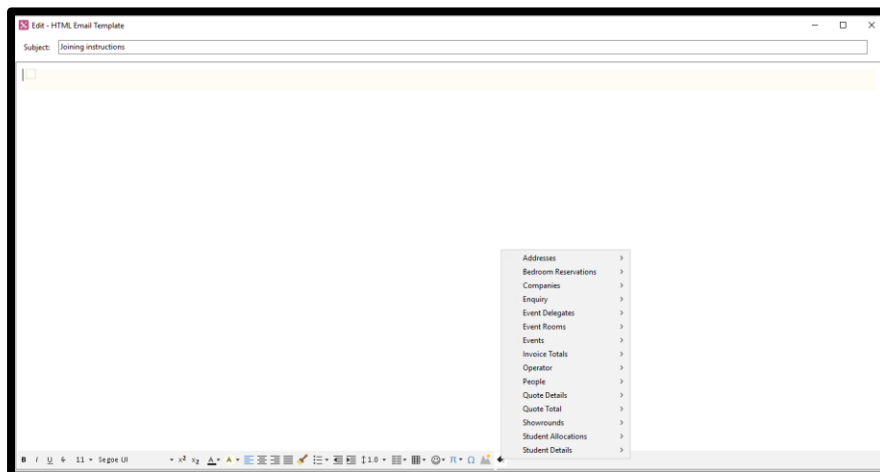


Complete the details, entering the description which will be used to select when sending the email. The template type will be Email. Click 'Save' and 'Edit Template'

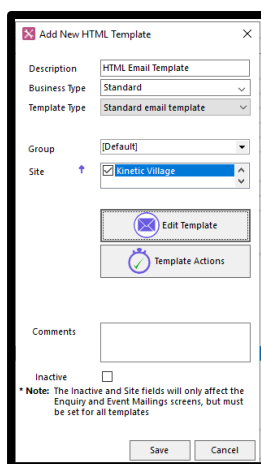
Remember to enter a subject line and enter the email information you can add images and URLs



The merge tags can be found along the bottom of the screen



Use the 'X' to close, and then save



Word Processing > Word Templates

Word processing word templates are designed to be used as Mailings and would therefore, typically be used within the *Mailings* tab of an Event.

From the Word Processing tab – select – Word Templates.

Click Add – select Add Word Template

Description – The name of the template so you can identify it

Business Type – For Commercial this is Standard.

Template Type – Letter (this may be labelled different at your venue)

Site – Choose the sites that this template will be used at.

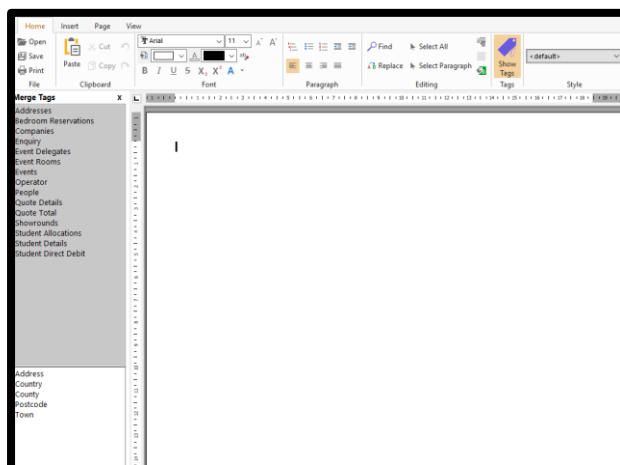
Comments – Further comments to help guide users when this template should be used.

Click save and Edit Template

You are then presented with a blank template with which to begin your new word template. This screen can be used in very much the same way as a normal word document.

You have the option to either free type your letter straight into this blank template or to copy and paste an existing word document into this screen. Then use the merge tags where required

Use the 'X' to save the document the same way as your email template

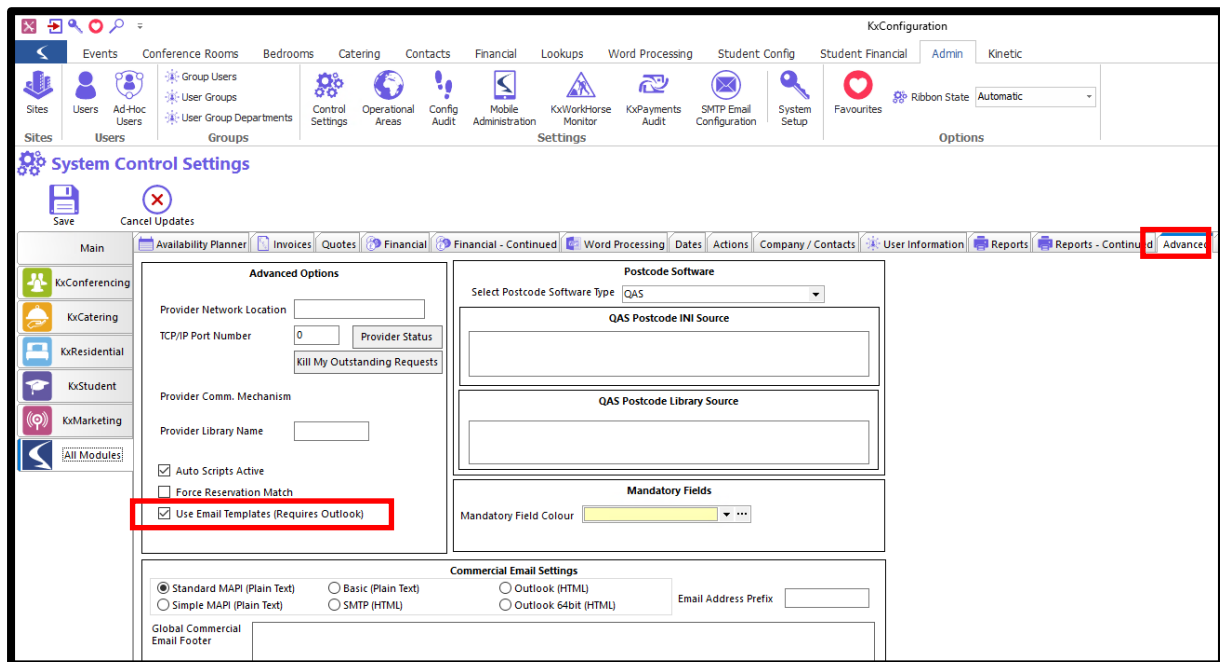


This area is for our Support team only.

Additional Configuration Settings

If these templates are not working correctly, check the following areas of KxConfiguration.

Specific *Control Settings* must be switched on for Word Template Emails to work. Ensure that *Use Email Templates* is ticked.



In the hidden area of KxConfiguration ensure that *Email Word Template Type* is set to *Commercial Email* and *Email Body Template Type* is set to *Commercial Email Body*.



The screenshot displays the 'Kinetic System Control Settings' application. The top navigation bar includes tabs for Events, Conference Rooms, Bedrooms, Catering, Contacts, Financial, Lookups, Word Processing, Student Config, Student Financial, Admin, and Kinetic. Below this, a secondary bar contains icons for various tools and settings, such as 'Compress Correspondence Data', 'Sites For Licence', 'Custom Settings', 'Logos', 'Application Plugins (DLLs)', 'Reports', 'Report Queries', 'Text Reports', 'Query Relationships', 'Custom Reports', 'Custom Queries', 'Key Card Interface Settings', and 'Key Card Interface'.

The main content area is titled 'Kinetic System Control Settings' and features a left-hand sidebar with a tree view of settings categories. The 'Commercial Email Templates' section is highlighted with a red box. This section contains two dropdown menus: 'Email Word Template Type' and 'Email Body Template Type', both of which are currently set to 'Commercial Email' and 'Commercial Email Body' respectively.

Other settings sections visible include:

- Conference Room Interface:** Includes fields for Room Interface Name, Active Database Name, Export Contact, Create Events For Syllabus Bookings, Contact Key Field (set to ExternalID), Contact Import Field (set to UserText2), Event Type (set to Residential Conference), Event Status (set to Provisional), Room Status (set to Week One), Company Role (set to Main Company), and Contact Role (set to Main Contact).
- Departure Date Update:** Includes a checkbox for 'Always able to edit event times / dates'.
- Show Web Publish:** Includes a checkbox for 'Show Web Published option on Events'.
- Availability Screen:** Includes radio buttons for 'Standard' and 'Complex Multi Site'.
- Event Quote Screen:** Includes radio buttons for 'Original Quote Screen' and 'Enhanced Quote Screen'.
- Booking Contract:** Includes a checkbox for 'Allow selection from all of the sites booking contracts'.
- Setup / Takedown:** Includes a checkbox for 'Allow enhanced setup/takedown times'.
- Event Summary:** Includes a checkbox for 'Use Old HTML Event Summary Pages'.

