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# Web Link Help File:

## E-mail Templates

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### Abstract

- This help file will illustrate how to customize e-mail templates that are used to generate notification messages sent to customers.

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### Procedure

1. Navigate to "Email Management" and then select "Manage Email Templates" from the drop down menu. The Email Templates page is a listing of all available templates that can be edited and customized. The email template grid consists of four columns (fig.1)
  - i. Event: This is the name of the template and clicking on this link will open the Edit Email template page allowing the Administrator to make changes to the selected email.
  - ii. Subject: This will appear in the subject line of the email that is generated and sent to the customer and can be edited as desired.
  - iii. Email Trigger: This column indicates under what circumstance the email is sent and who it is sent to.
  - iv. The final column either contains a green checkmark which indicates that the email template is enabled or a red x which indicates that the email template is inactive or is not used. All templates can be enabled or deactivated from the Edit Email page.

Part =

Customer# **DEFAULT** Home > Email Management > Manage Email Templates

### Manage Email Templates

Use this page to compose emails for different events as mentioned below. Simply click on any link of your choice in the event field to design template for email that will be sent for that particular event.

Event	Subject	Email Trigger	
<a href="#">Forgot Password</a>	Welcome to B2B Demo	User submits Forgot Password request.	✓
<a href="#">Lost Sale Submitted</a>	A Customer Submitted a Lost Sale	User reports a Lost Sale for a part that is out of stock (Sent to Admin).	✓
<a href="#">Order Confirmation</a>	B2B Demo Order Confirmation	User places an order.	✓
<a href="#">Order Shipped</a>	Your B2B Demo Order Has Been Shipped	A tracking number is entered in the Enter Tracking Number tool.	✓
<a href="#">Part Available</a>	Your Requested Part is Now Available at B2B Demo	Web Admin notifies a user that a Lost Sale part they reported is now in stock.	✓
<a href="#">Promotion #1</a>	A Coupon from B2B Demo	Option when using Send Promotions.	✓
<a href="#">Promotion #2</a>	A Coupon from B2B Demo	Option when using Send Promotions.	✗
<a href="#">Promotion #3</a>	A Coupon from B2B Demo	Option when using Send Promotions.	✓
<a href="#">Return Completed</a>	Your Return Request Has Been Completed	Your Return Request Has Been Completed.	✓
<a href="#">Return Received</a>	Your Return Request Has Been Received	User submits a return request (Sent to user).	✓
<a href="#">Return Submitted (Admin Notification)</a>	A Return Request Has Been Submitted	User Submits a return request (Sent to Admin).	✓
<a href="#">Return Updated</a>	Your Return Request Has Been Updated	Admin marks return request as approved or received (Sent to user).	✓
<a href="#">User Registration Approved</a>	Welcome to B2B Demo	Pending user registration is approved by Admin (Sent to user).	✓
<a href="#">User Registration</a>	Welcome to B2B Demo	User registers & website is configured to auto-approve registration.	✓
<a href="#">User Registration Pending (Admin Notification)</a>	Pending User Registration for Approval.	User register & website is configured for Admin to approve (Sent to Admin).	✓
<a href="#">User Registration Submitted</a>	Your Requested B2B Demo Registration Has Been Submitted.	User registers & website is configured for Admin to approve (Sent to user).	✓

fig.1

- Clicking on the Event link opens the Edit Email page. In this example we have selected the Order Confirmation email template. (fig. 2 and 3)

**Manage Email Templates**

Use this page to compose emails for different events as mentioned below. Simply click on any link of your choice in the event field to design template for email that will be sent for that particular event.

Event
<a href="#">Forgot Password</a>
<a href="#">Lost Sale Submitted</a>
<a href="#">Order Confirmation</a>
<a href="#">Order Shipped</a>
<a href="#">Part Available</a>

fig.2

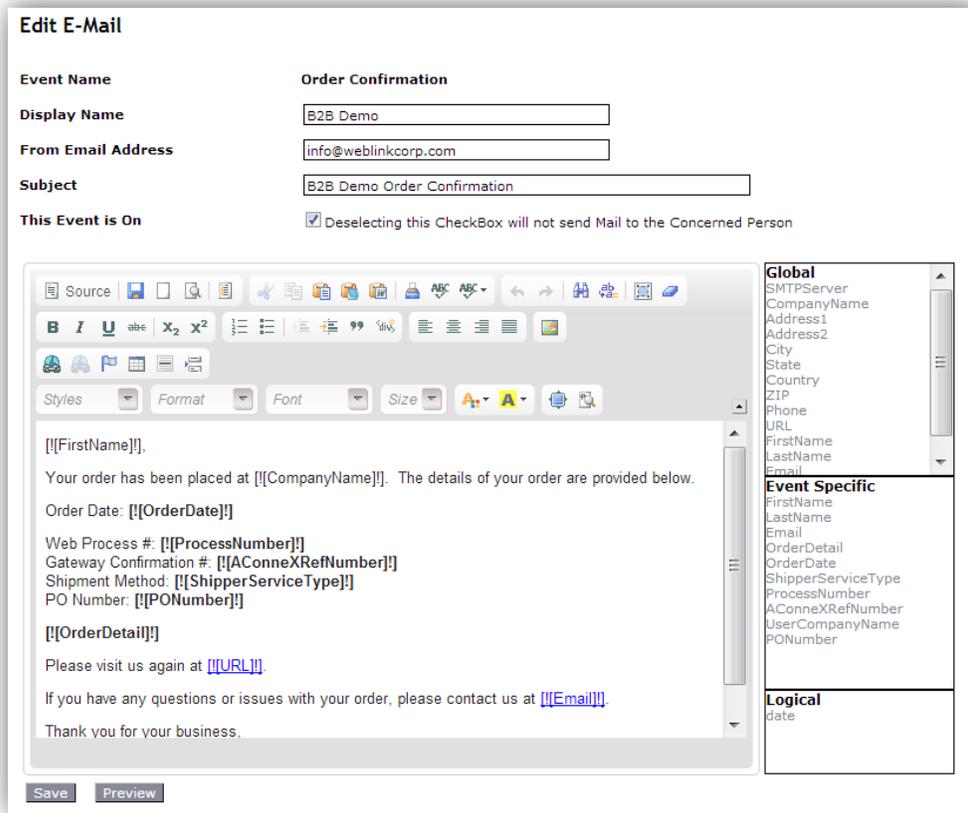


fig.3

3. The top of the page contains several user defined field boxes (fig.4)

- Display Name: Administrator can enter the name that will displayed in the email.
- From Email Address: Enter the email address that will be displayed in the "from" field of the generated email message.
- Subject: The user can enter a subject for the email message.



fig.4

4. Place a check in the "This Event is On" box directly below the user field boxes. This ensures that the email will be sent automatically for the associated event. (fig. 5)



fig.5

5. The text editor window is used to generate and design the email message. This window can be toggled between Design view (default view) and HTML view by clicking on the "Source" button at the top of the window. The Design view provides a WYSIWYG interface with a formatting tool bar. This view allows the user to easily modify the email without the use of HTML code. (fig.6)

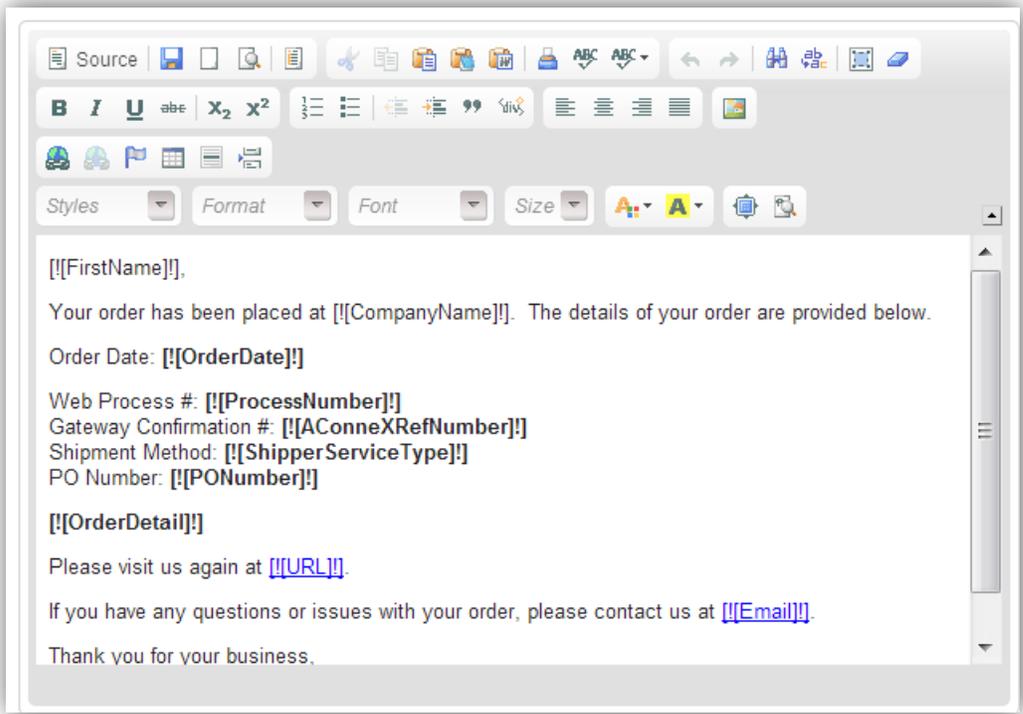


fig.6

- To the right of the text editor window is a list of Global, Event Specific and Logical place holder data links. These links refer back to the database and pull the designated information and place it in the email message exactly where the data link is positioned. In the example below, by placing a `[[FirstName]]` data link in the email, the first name of the customer who places an order will be inserted in that field automatically when the message is generated. Several other data links have been used in this example where data regarding the order will be inserted. (fig.7)

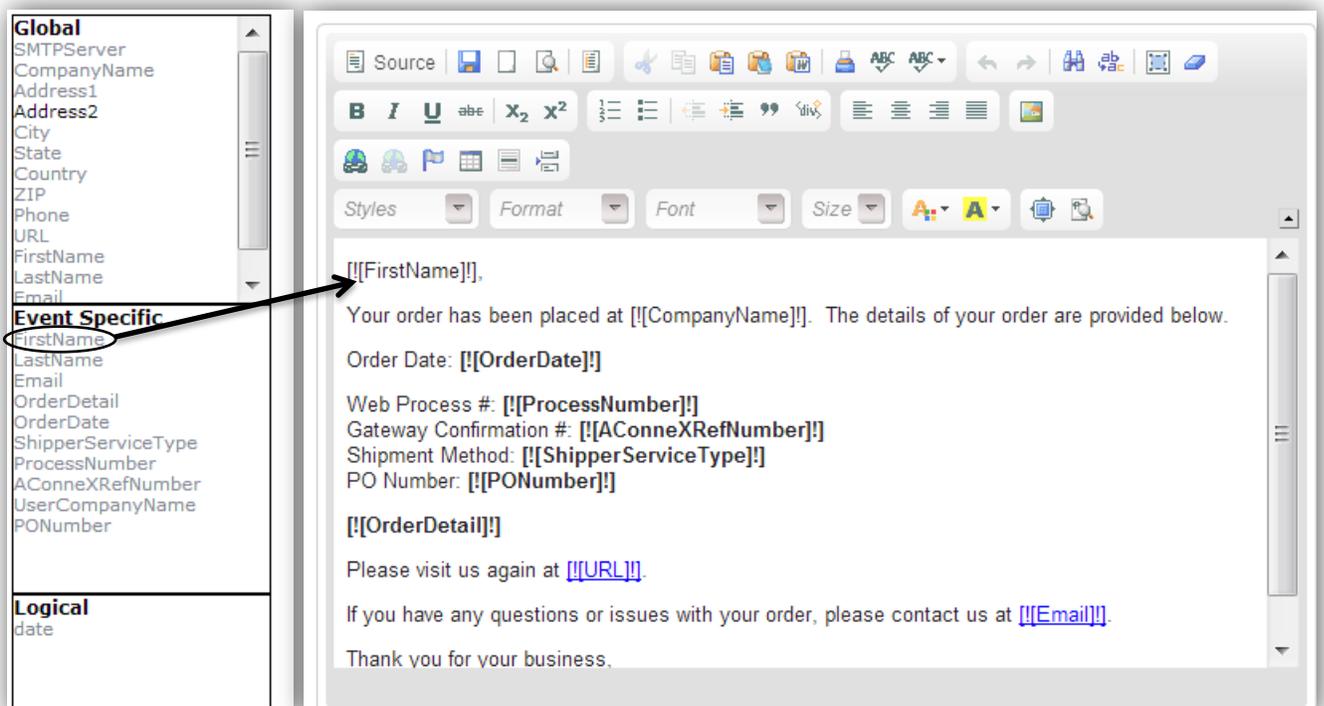


fig.7

7. Clicking on the "Preview" button at the bottom of the page opens a pop up window. This window shows exactly how the email will look to the recipient. (fig. 8 and 9)

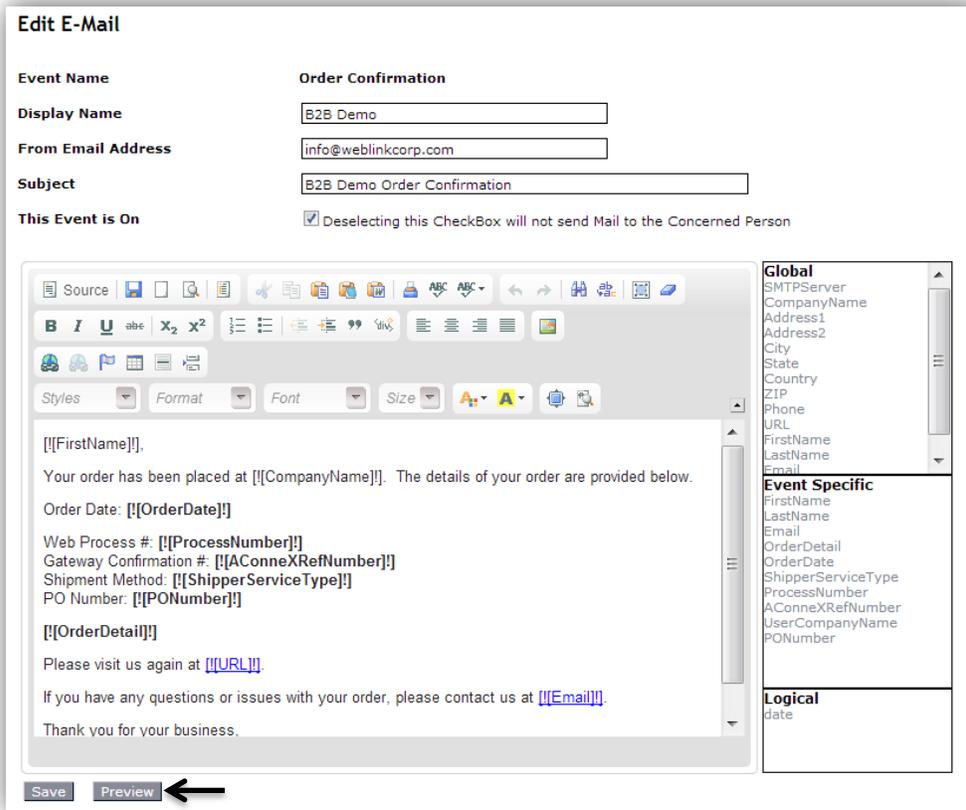


fig.8

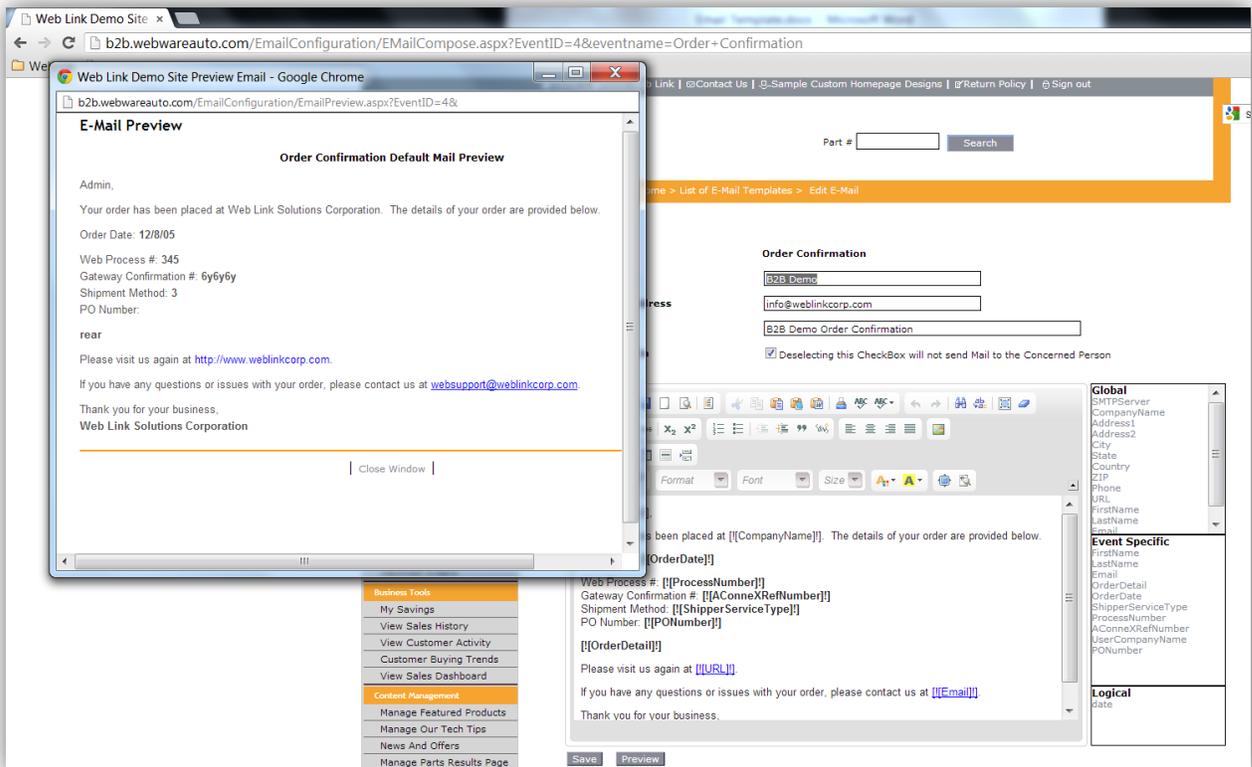


fig.9

8. Clicking on the "save" button saves all changes made to the template. (fig. 10)

**Edit E-Mail**

**Event Name**                      **Order Confirmation**

**Display Name**                      B2B Demo

**From Email Address**                      info@weblinkcorp.com

**Subject**                      B2B Demo Order Confirmation

**This Event is On**                       Deselecting this CheckBox will not send Mail to the Concerned Person

Source   

[[FirstName]],

Your order has been placed at [[CompanyName]]. The details of your order are provided below.

Order Date: [[OrderDate]]

Web Process #: [[ProcessNumber]]

Gateway Confirmation #: [[AConneXRefNumber]]

Shipment Method: [[ShipperServiceType]]

PO Number: [[PONumber]]

[[OrderDetail]]

Please visit us again at [\[\[URL\]\]]([[URL]]).

If you have any questions or issues with your order, please contact us at [\[\[Email\]\]](mailto:[[Email]]).

Thank you for your business.

**Global**

- SMTPServer
- CompanyName
- Address1
- Address2
- City
- State
- Country
- ZIP
- Phone
- URL
- FirstName
- LastName
- Email

**Event Specific**

- FirstName
- LastName
- Email
- OrderDetail
- OrderDate
- ShipperServiceType
- ProcessNumber
- AConneXRefNumber
- UserCompanyName
- PONumber

**Logical**

- date

**Save**    **Preview**

fig.10