

## **Web Link** Help File: E-mail Templates

## Abstract

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

## Procedure

- 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.

Catalones' EFAULT  Vone > Enail Management > Manage Email Templates  Kanage Email Templates  Kanage Email Templates  Les this page to compose semails 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.  Foracl Password  Velome to B28 Demo User submitsed a Lost Sale  Foracl Password Velome to B28 Demo User submitsed For email that is out of store Management  Manage Email Templates  Coder Shipped  Order Shipped  Order Shipped  Order Shipped  Order Shipped  Order Shipped  Coding Management  Veloane Macagement  Veloane Macagement  Veloane Management  Veloane Koster  Veloane Management  Veloane Store Management  Veloane Koster  Veloane Management  Veloane Koster  Veloane Ko	SPECIALIZED ECOMMERCE	KOLUTIONS	Part #	Search	
Expand AI       The Shange Email Template of annual the wild be send for that particular event.         Start Shange Tools       Sub the page to compose smalls for different events as mentioned below.Simply click on any link of your choice in the event field to that particular event.         Start Shange Tools       Sub the page to compose smalls for different events as mentioned below.Simply click on any link of your choice in the event field to that particular event.         Water Start       Subject       Event Subject       Event Subject       Forced Password       Subject         Manage Email Templates       Control to Attagement.       User reports a Lost Sale for a part that is out of stock (Semt to Admin).       Subject       S	Customer# DEFAULT	Home > Email Management > Manage	Email Templates		
Bioless Tools         Event         Subject         Email Trigger           Bioless Tools         Context Management         Welcome to B2B Demo         User submits Forgot Password request.         Image Submits Forgot Password Forgot Pa	Expand All	Manage Email Template Use this page to compose emails f design template for email that will	tor different events as mentioned below.Sin be sent for that particular event.	nply click on any link of your choice in the event field	to
Buskess Tools       Forgot Password       Welcome to B2B Demo       User submits Forgot Password request.         My Acoant       Lost Sale Submitted       A Customer Submitted a Lost Sale       User reports a Lost Sale for a part that is out of stock (Sent to Admin).         Manage Email Templates       Manage Email Templates       Order Confirmation       User places an order.         Manage Email Settings       Your B2B Demo Order Confirmation       User places an order.       Image Places an order.         Order Confirmation       B2B Demo Order Has Been       A tracking number is entered in the Enter Tracking in the Confirmation of the Your Requested Part is Now Available at the Yeeported is now in stock.       Part Available       Your Requested Part is Now Available at the Yeeported is now in stock.         Promotion #1       A Coupon from B2B Demo       Option when using Send Promotions.       Image Places an order.         Vakial Management       Your Request Has Been       Option when using Send Promotions.       Image Places an order.         Vakial Management       Promotion #2       A Coupon from B2B Demo       Option when using Send Promotions.       Image Places an order.         Vakial Management       Your Return Request Has Been       Your Return Request Has Been       Your Return Request Has Been       Your Return Request (Sent to user).       Image Places an order received (Sent to user).       Image Places an order received (Sent to user).       Image Places an ord	Order Status	Event	Subject	Email Trigger	
Content Management       Isst Sale Submitted       A Customer Submitted a Lost Sale       User reports a Lost Sale for a part that is out of stock (Sen to Admin).         Manage Email Templates       Order Confirmation       B2B Demo Order Confirmation       User places an order.       Image places an order.         Window Management       Order Shipped       Your B2B Demo Order Has Been       A tracking number is entered in the Enter Tracking or Momer tool.         Part Available       Your B2B Demo Order Has Been       A tracking number is entered in the Enter Tracking or Momer tool.         Part Available       Your R2B Demo Order Has Been       Number tool.         Part Available       Your R2B Demo       Option when using Send Promotions.         Promotion #1       A Coupon from B2B Demo       Option when using Send Promotions.         Valid karagement       Your R2B Demo       Option when using Send Promotions.         Valid karagement       Your Return Request Has Been       Option when using Send Promotions.       Visit Visi	Business Tools	Forgot Password	Welcome to B2B Demo	User submits Forgot Password request.	-
Emil Manage Email Templates       Order Confirmation       B2B Demo Order Confirmation       User places an order.       Image Email Templates         Manage Email Templates       Order Confirmation       Stripped       Your B2B Demo Order Has Been Number tool.       Image Templates         Promotion Management       User Login Management       Your Requested Part is Now Available at B2B Demo       Web Admin notifies a user that a Lost Sale part B2B Demo       Image Templates       Image Sensitive Sensiti Sensitive Sensitive Sensitive Sensitive Sensitive Sense	Content Management My Account	Lost Sale Submitted	A Customer Submitted a Lost Sale	User reports a Lost Sale for a part that is out of stock (Sent to Admin).	Ŵ
Manage Email Settings       Order Shipped       Your B2B Demo Order Has Been Shipped       A tracking number is entered in the Enter Tracking         Promotion Management       Vour Requested Part is Now Available at B2B Demo       Web Admin notifies a user that a Lost Sale part they reported is now in stock.         Catalog Management       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.       Image: Sole part they reported is now in stock.         Vehicle Management       Your Requested Part is Now Available at B2B Demo       Option when using Send Promotions.       Image: Sole part they reported is now in stock.         Yehicle Management       Your Return Request Has Been Completed       Option when using Send Promotions.       Image: Sole part they reported is now in stock.         Your Return Services       Your Return Request Has Been Completed       User submits a return request (Sent to user).       Image: Sole part website is configured to auto- approver (Sent to user).         Return Lodated       Your Return Request Has Been Updated       Admin marks return request by Admin (Sent to user).       Image: Sole part website is configured for Admin to approve (Sent to user).       Image: Sole part website is configured for Admin to approve (Sent to user).       Image: Sole part website is configured for Admin to approve (Sent to user).       Image: Sole part website is confi	Email Management Manage Email Templates	Order Confirmation	B2B Demo Order Confirmation	User places an order.	Ŵ
Part Available         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.           Catalog Management         Promotion #1         A Coupon from B2B Demo         Option when using Send Promotions.         X           Catalog Management         Promotion #1         A Coupon from B2B Demo         Option when using Send Promotions.         X           Vehicle Management         Promotion #2         A Coupon from B2B Demo         Option when using Send Promotions.         X           Virtual Inventory Management         Var Return Completed         Your Return Request Has Been Completed         Option when using Send Promotions.         X           Return Completed         Your Return Request Has Been Completed         Your Return Request Has Been Completed         User submits a return request (Sent to user).         X           Return Dydated         Your Return Request Has Been Submitted         User Submits a return request (Sent to Admin).         X           User Registration Approved         Welcome to B2B Demo         Pering user registration is approved by Admin         X           User Registration Submitted         Pering User Registration for Approval.         User register & website is configured to auto- approve (Sent to user).         X           User Registration Submitted         Pending User Registration for Approval.         User register & website is configured for Ad	Manage Email Settings	Order Shipped	Your B2B Demo Order Has Been Shipped	A tracking number is entered in the Enter Tracking Number tool.	Ŵ
Customer Account Management       Promotion #1       A Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Vehicle Management       Promotion #2       A Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Valide Management       Promotion #2       A Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Virtual Inventory Management       Promotion #3       A Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Virtual Inventory Management       Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Virtual Inventory Management       Promotion #3       A Coupon from B2B Demo       Option when using Send Promotions.       Image: Catalog Management         Virtual Inventory Management       Virtual Inventory Management       Your Return Request Has Been       Your Return Request Has Been       Vour Return Request Has Been       Vour Return request (Sent to user).       Image: Catalog Management         Customer Services       Return Submitted (Admin Notification)       A Return Request Has Been Submitted       User Submits a return request (Sent to ddmin).       Image: Catalog Management         Vour Return Request Has Been Submitted       Vour Return Request Has Been Submitted       User registration is approved or received (Sent t	User Login Management	Part Available	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.	Ŵ
Catalog Management       Vehicle Management       Promotion #2       A Coupon from B2B Demo       Option when using Send Promotions.       X         Tax & Shipment Management       Vehicle Management       Promotion #3       A Coupon from B2B Demo       Option when using Send Promotions.       X         Virtual Inventory Management       Contomer Services       Your Return Request Has Been Completed       Your Return Request Has Been Completed       Your Return Request Has Been Received       Your Return Request Has Been Received       User submits a return request (Sent to user).       X         Return Submitted (Admin Notification)       A Return Request Has Been Submitted       User Submits a return request (Sent to Admin).       X         User Registration Approved       Welcome to B2B Demo       Pending user registration is approved by Admin (Sent to user).       X         User Registration       Welcome to B2B Demo       User registers & website is configured to auto- approve registration.       X         User Registration       Pending User Registration for Approval.       User registers & website is configured for Admin to approve (Sent to Jamin).       X	Customer Account Management Credits & Returns	Promotion #1	A Coupon from B2B Demo	Option when using Send Promotions.	Ŵ
Tax & Shipment Management         Virtual Inventory Management         Contomer Services         Return Completed         Your Return Request Has Been Completed         Return Received         Your Return Request Has Been Combiner Services         Return Received         Your Return Request Has Been Received         Return Submitted (Admin Notification)         Return Updated         Your Return Request Has Been Submitted         User Submits a return request (Sent to user).         Return Updated         Your Return Request Has Been Submitted         User Registration Approved         Welcome to B2B Demo         User registration.         User Registration         Welcome to B2B Demo         User registration.         User Registration         Welcome to B2B Demo         User registration.         User Registration         Welcome to B2B Demo         User registration.         User Registration. <t< td=""><td>Catalog Management</td><td>Promotion #2</td><td>A Coupon from B2B Demo</td><td>Option when using Send Promotions.</td><td>X</td></t<>	Catalog Management	Promotion #2	A Coupon from B2B Demo	Option when using Send Promotions.	X
Return Completed         Your Return Request Has Been Completed         Your Return Request Has Been Completed         Your Return Request Has Been User submits a return request (Sent to user).           Return Submitted (Admin Notification)         A Return Request Has Been Submitted         User Submits a return request (Sent to Admin).         Image: Service Ser	Tax & Shipment Management	Promotion #3	A Coupon from B2B Demo	Option when using Send Promotions.	Ŵ
Return Received       Your Return Request Has Been Received       User submits a return request (Sent to user).         Return Submitted (Admin Notification)       A Return Request Has Been Submitted       User Submits a return request (Sent to user).         Return Updated       Your Return Request Has Been Submitted       User Submits a return request (Sent to user).         User Registration Approved       Your Return Request Has Been Updated       Admin marks return request as approved or received (Sent to user).         User Registration Approved       Welcome to B2B Demo       Pending user registration is approved by Admin (Sent to user).         User Registration       Welcome to B2B Demo       User registers & website is configured to auto- approve registration.         User Registration       Pending User Registration for Approval.       User register & website is configured for Admin to approve (Sent to Admin).         User Registration Submitted       Your Requested B2B Demo Registration (Sent to Admin).       Sent to Admin).	Virtual Inventory Management Customer Services	Return Completed	Your Return Request Has Been Completed	Your Return Request Has Been Completed.	Ŵ
Return Submitted (Admin Notification)       A Return Request Has Been Submitted       User Submits a return request (Sent to Admin).         Return Updated       Your Return Request Has Been Updated       Admin marks return request as approved or received (Sent to user).       Image: Comparison of the com		Return Received	Your Return Request Has Been Received	User submits a return request (Sent to user).	Ŵ
Return Updated       Your Return Request Has Been Updated       Admin marks return request as approved or received (Sent to user).         User Registration Approved       Welcome to B2B Demo       Pending user registration is approved by Admin (Sent to user).         User Registration       Welcome to B2B Demo       User registers & website is configured to auto-approve registration.         User Registration Pending (Admin Notification)       Pending User Registration for Approval.       User register & website is configured for Admin to approve (Sent to Admin).         User Registration Submitted       Your Requested B2B Demo Registration for Approval.       User registers & website is configured for Admin to approve (Sent to user).		Return Submitted (Admin Notification)	A Return Request Has Been Submitted	User Submits a return request (Sent to Admin).	Ŵ
User Registration Approved       Welcome to B2B Demo       Pending user registration is approved by Admin (Sent to user).         User Registration       Welcome to B2B Demo       User registers & website is configured to auto- approve registration.         User Registration       Welcome to B2B Demo       User registers & website is configured to auto- approve registration.         User Registration Pending (Admin Notification)       Pending User Registration for Approval.       User register & website is configured for Admin to approve (Sent to Admin).         User Registration Submitted       Your Requested B2B Demo Registration approve (Sent to user).       User registers & website is configured for Admin to approve (Sent to user).		Return Updated	Your Return Request Has Been Updated	Admin marks return request as approved or received (Sent to user).	Ŵ
User Registration       Welcome to B2B Demo       User registers & website is configured to auto-approve registration.         User Registration Pending (Admin Notification)       Pending User Registration for Approval.       User register & website is configured for Admin to approve (Sent to Admin).         User Registration Submitted       Your Requested B2B Demo Registration (User registers & website is configured for Admin to approve (Sent to user).		User Registration Approved	Welcome to B2B Demo	Pending user registration is approved by Admin (Sent to user).	Ŵ
User Registration Pending (Admin Notification)         Pending User Registration for Approval.         User register & website is configured for Admin to approve (Sent to Admin).           User Registration Submitted         Your Requested B2B Demo Registration Be Been Submitted.         User registers & website is configured for Admin to approve (Sent to user).		User Registration	Welcome to B2B Demo	User registers & website is configured to auto- approve registration.	Ŵ
User Registration Submitted Your Requested B2B Demo Registration User registers & website is configured for Admin to Has Been Submitted. approve (Sent to user).		User Registration Pending (Admin Notification)	Pending User Registration for Approval.	User register & website is configured for Admin to approve (Sent to Admin).	Ŵ
		User Registration Submitted	Your Requested B2B Demo Registration Has Been Submitted.	User registers & website is configured for Admin to approve (Sent to user).	Ŵ

2. 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)



it Name	Order Confirmation			
lay Name	B2B Demo			
n Email Address	info@weblinkcorp.com			
ect	B2B Demo Order Confirmation			
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[FirstName]!],			URL FirstName LastName	- -
our order has been placed a	t [![CompanyName]!]. The details of your order are provided below.		Event Specific	
rder Date: [![OrderDate]!]			FirstName LastName Empil	
Veb Process #: [ <b>![ProcessN</b> ateway Confirmation #: [ <b>![A</b> hipment Method: [ <b>![Shipper</b> O Number: <b>[![PONumber]!]</b>	ımber]!] ConneXRefNumber]!] ServiceType]!]	=	Critan OrderDetail OrderDate ShipperServiceType ProcessNumber AConneXRefNumber	
[OrderDetail]!]			UserCompanyName PONumber	
lease visit us again at [![URL	10.			
you have any questions or is	ssues with your order, please contact us at [ <u>![Email]!</u> ].		Logical	-
hank you for your business		-	uare	

- 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.

Edit E-Mail		fig.
Event Name	Order Confirmation	
Display Name	B2B Demo	
From Email Address	info@weblinkcorp.com	
Subject	B2B Demo Order Confirmation	

 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)

Event Name	Order Confirmation	fig.5
Display Name	B2B Demo	fig.5
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	

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)



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)



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)

vent Name Order Confirmation			
splay Name B2B Demo			
om Email Address			
B2B Demo Order Confirmation			
is Event is On	Concerned F	Person	
E Source	<i>a</i>	Global SMTPServer CompanyName Address1 Address2	•
		City State	=
Styles 🛡 Format 🐨 Font 🐨 Size 🐨 🗛 🛪 🖨 🖏		Country ZIP Phone URL EirstName	
<pre>[![rirstivame]!], Your order has been placed at [![CompanyName]!]. The details of your order are provided be Order Date: [![OrderDate]!] Web Process #: [![ProcessNumber]!]</pre>	elow.	LastName Email Event Specific FirstName LastName Email OrderDetail	~
Gateway Confirmation #: [I[AConneXRefNumber]!] Shipment Method: [I[ShipperServiceType]!] PO Number: [I[PONumber]!] [IIOrdoeDatailII]	≡	OrderDate ShipperServiceType ProcessNumber AConneXRefNumber UserCompanyName	
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n you nave any questions of issues with your order, prease contact us at <u>incrnainin</u> .	-	date	

Web Link Demo Site Preview Email - Google Chrome	Link   @Contact Us   @Sample Custom Homepage Designs   @Return Policy   A	Sian out
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E-Mail Preview Order Confirmation Default Mail Preview	Part # Search	
Admin,	time > List of F-Mail Templates > Edit F-Mail	
Your order has been placed at Web Link Solutions Corporation. The details of your order a	re provided below.	
Order Date: 12/8/05		
Web Process #: 345	Order Confirmation	
Gateway Confirmation #: 6y6y6y	B2B Demo	
Shipment Method: 3 PO Number:	info@weblinkcorp.com	
rear	E B2B Demo Order Confirmation	
Please visit us again at http://www.weblinkcorp.com	Deselecting this CheckBox will not send Mail to the Conce	rned Person
If you have any questions or issues with your order please contact us at websupport@web	linkcoro com	
Thank you for your business		SMTPServer
Web Link Solutions Corporation	+ x <sub>2</sub> x <sup>2</sup> ≟ ⊟ (≤ ≰ ♥ ₩8 ≧ ≘ Ξ Ξ Ξ	Address1 Address2
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	OrderDate]]]	Event Specific FirstName
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View Sales History	PO Number: [[PONumber]!]	ProcessNumber AConneXRefNumber
View Customer Activity	[![OrderDetail]!]	UserCompanyName PONumber
Customer Buying Trends View Sales Dashboard	Please visit us again at [![URL]!].	
Content Management	If you have any questions or issues with your order, please contact us at [[[Email]]].	Logical
Manage Featured Products	Thank you for your business	* vare

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

nt Name	Order Confirmation	
splay Name	B2B Demo	
om Email Address	info@weblinkcorp.com	
ıbject	B2B Demo Order Confirmation	
is Event is On	Deselecting this CheckBox will not send Mail to the Conce	erned Person
El Source 🔲 🗖 🖓 🗒	2 En 😤 📾 🖴 ABC ABC - 4 🔺 40 🖂 🖉 🖉	Global
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		Address2 City
		State E Country
Styles 🔽 Format 💌	Font 🔄 Size 🔽 🗛 🛪 🏚 🖏	ZIP Phone
[![FirstName]!],		URL     FirstName     LastName
Your order has been placed at	[![CompanyName]!]. The details of your order are provided below.	Email
Order Date: [![OrderDate]!]		FirstName LastName
Web Process #: [![ProcessNu Gateway Confirmation #: [![AC Shipment Method: [![Shipper PO Number: [![PONumber]!]	mber]!] onneXRefNumber]!] ServiceType]!]	Email OrderDetail E OrderDate ShipperServiceType ProcessNumber AConeXRefNumber
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Please visit us again at [![URL	Щ.	
If you have any questions or is	sues with your order, please contact us at [[[Email]]].	Logical
		date