

Custom Email Templates



Is this feature disabled?



Contact To Enable

This feature needs to be switched on for your site by Commerce Vision. Implementation also requires consultation with Professional Services.

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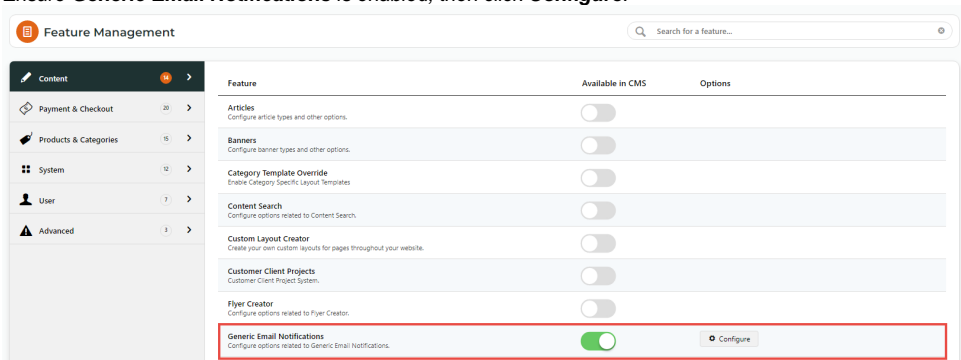
Overview

Create custom email notification templates with the Generic Email Notifications. Each template is linked to a notification type so keeping track of them and testing them is easy.

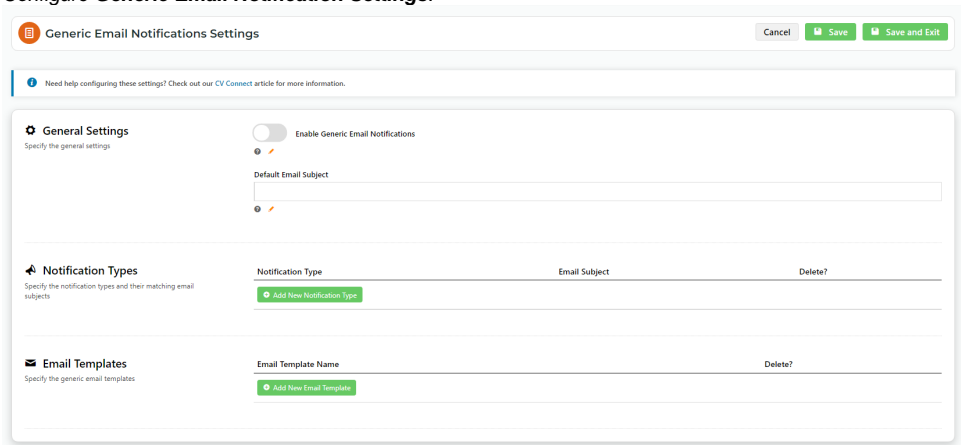
Step-by-step guide

1. Enable and configure feature

1. Go to **Settings Settings Feature Management Content**.
2. Ensure **Generic Email Notifications** is enabled, then click **Configure**.



3. Configure **Generic Email Notification Settings**.



4. To enable this feature on your site, in **General Settings**, toggle **ON Enable Generic Email Notifications**.

5. In **Default Email Subject**, enter a default email subject for generated emails.

2. Add a Notification Type

1. Go to the **Notification Types** section.
2. Click **Add Notification Type**.
3. In **Notification Type**, enter a description of the email notification type.

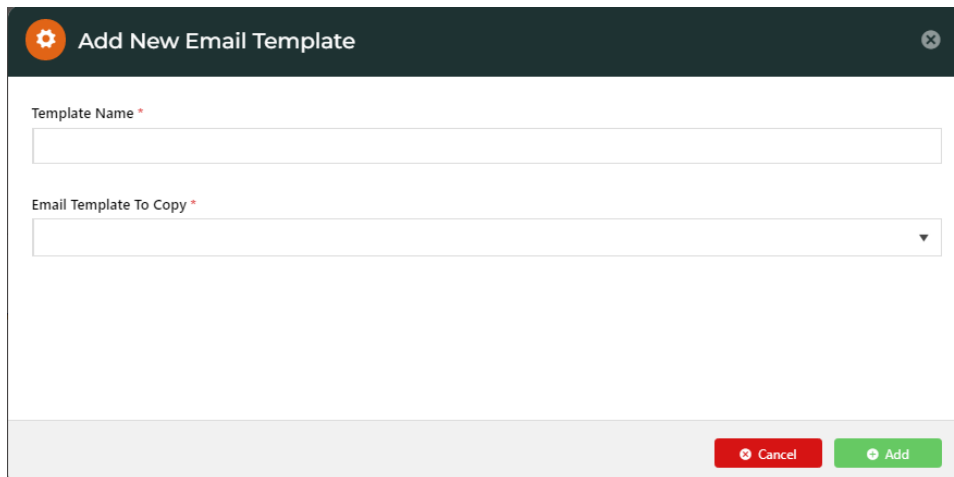


The screenshot shows the 'Notification Types' section. On the left, there is a header 'Notification Types' with a subtext 'Specify the notification types and their matching email subjects'. To the right, there is a table with two columns: 'Notification Type' and 'Email Subject'. Below the 'Notification Type' column, there is a text input field. Below the 'Email Subject' column, there is a text input field and a 'Delete?' toggle switch. At the bottom of the table, there is a green button labeled 'Add New Notification Type'.

4. In **Email Subject**, enter the email subject for the notification type.
5. Click **Save**.

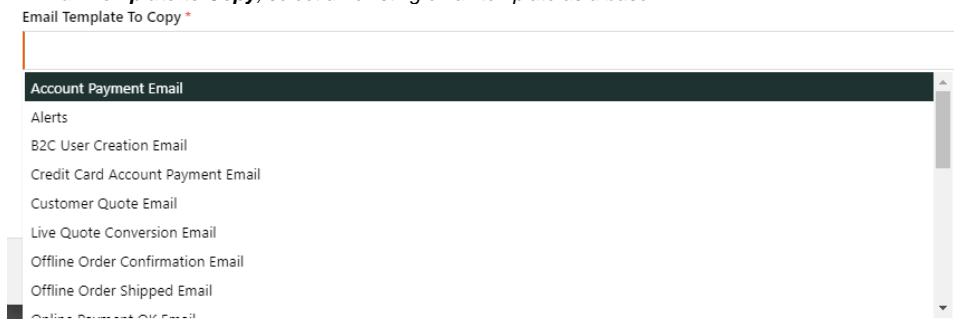
3. Specify Email Template

1. Go to the **Email Templates** section.
2. Click **Add New Email Template**.
3. Create the new email template in the **New Email Template** popup. In **Template Name**, enter a unique name. It cannot be the same as an existing email template.



The screenshot shows the 'Add New Email Template' popup form. The form has a dark header with a gear icon and the title 'Add New Email Template'. Below the header, there are two main sections. The first section is labeled 'Template Name *' and contains a text input field. The second section is labeled 'Email Template To Copy *' and contains a dropdown menu. At the bottom of the form, there are two buttons: a red 'Cancel' button and a green 'Add' button.

4. In **Email Template to Copy**, select an existing email template as a base.



The screenshot shows the 'Email Template To Copy' dropdown menu. The dropdown is open, showing a list of email templates. The first item is 'Account Payment Email', which is highlighted. Other items in the list include 'Alerts', 'B2C User Creation Email', 'Credit Card Account Payment Email', 'Customer Quote Email', 'Live Quote Conversion Email', 'Offline Order Confirmation Email', 'Offline Order Shipped Email', and 'Online Payment OK Email'.

5. Click **Save**. Once saved, the new template Id (Identifier as a guid) can be copied to clipboard. **NOTE** - The use of the Id is for Commerce Vision implementation.
6. Edit the template as you need. Created templates are stored in **Content Emails Misc**. But they can be accessed directly by clicking **Edit Template** next to the email template name.

Email Templates

- ★ My Favourites 0 >
- ✉ Orders 12 >
- ✉ Payments & Accounts 3 >
- ✉ Users 1 >
- ✉ Misc 9 >

Email Template Name	Delete?
B2C User Creation Email	Copy Template Id To Clipboard Edit Template <input type="checkbox"/>

TIP - Email templates created here can only be accessed if this feature is enabled.

4. Test Email Template (optional)



If this email template comes with an attached document, e.g., a quote attached email, it cannot be tested using the Test Email feature.

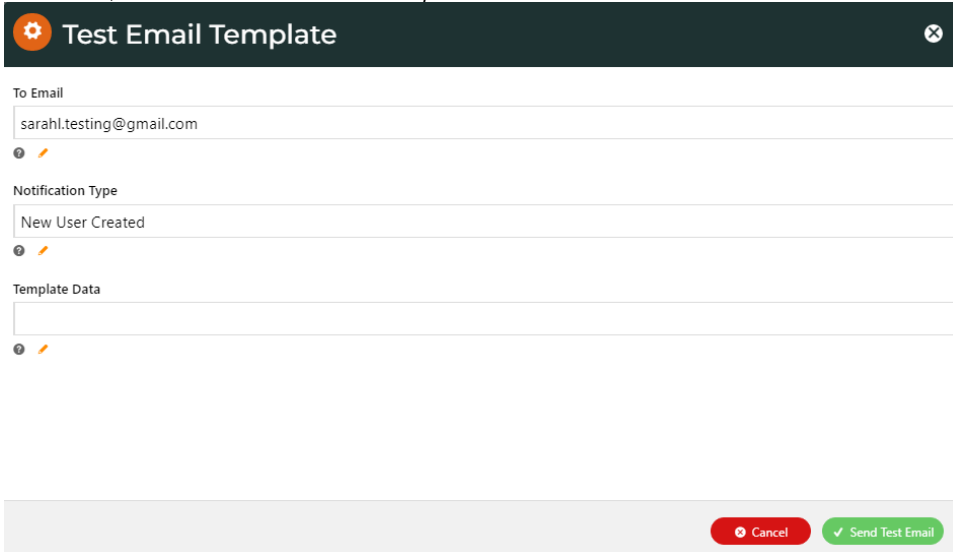
Once you are in the email template, you can test it.

1. Click **Test Email**.

Edit - User Creation General

Back Options **Test Email...**

2. In **To Email**, enter the email address of the recipient who will receive this email.

A dark-themed dialog box titled "Test Email Template" with a close button (X) in the top right corner. It contains three input fields: "To Email" with the value "sarahl.testing@gmail.com", "Notification Type" with the value "New User Created", and "Template Data" which is empty. Each field has a small help icon (question mark) and an edit icon (pencil) to its left. At the bottom right, there are two buttons: a red "Cancel" button and a green "Send Test Email" button.

3. In **Notification Type**, if not filled, enter the name of the notification type (exactly as in the Notification Type field when it was created).

4. **Template Data** should have been filled already.

5. Click **Send Test Email**.

Additional Information

Minimum Version Requirements	4.37
Prerequisites	--
Self Configurable	No
Business Function	Content Management
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [B2B User Registration](#)
- [Create Users to Approve Report](#)
- [Email Template List](#)
- [Website User Maintenance for Account Admins](#)
- [Website User Roles](#)

Related widgets

- [B2C Registration Verification Notification Widget](#)
- [B2C Registration Verification User Notification Email Widget](#)
- [B2C Registration Verification Required Email Widget](#)
- [Register Widget](#)

