Widget-Based Email Templates

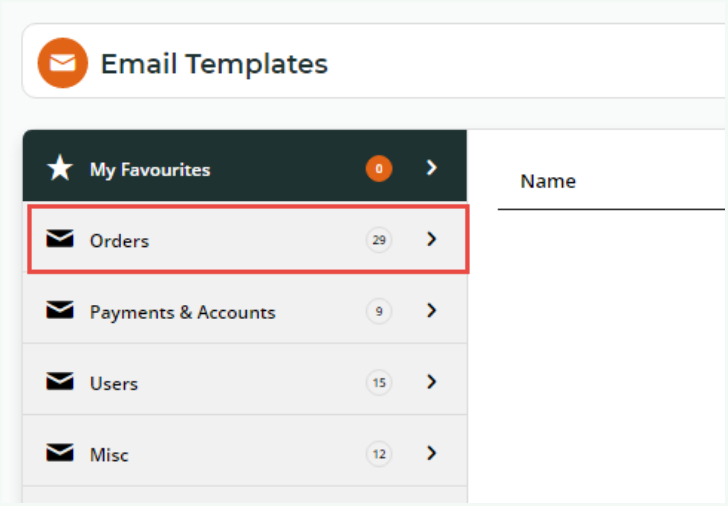
Overview

On implementation of a Best Practice Design (BPD) website, several email templates are configured for use out of the box. These include:

- Order Confirmation
- Order Shipped
- Password Recovery
- New User Registration

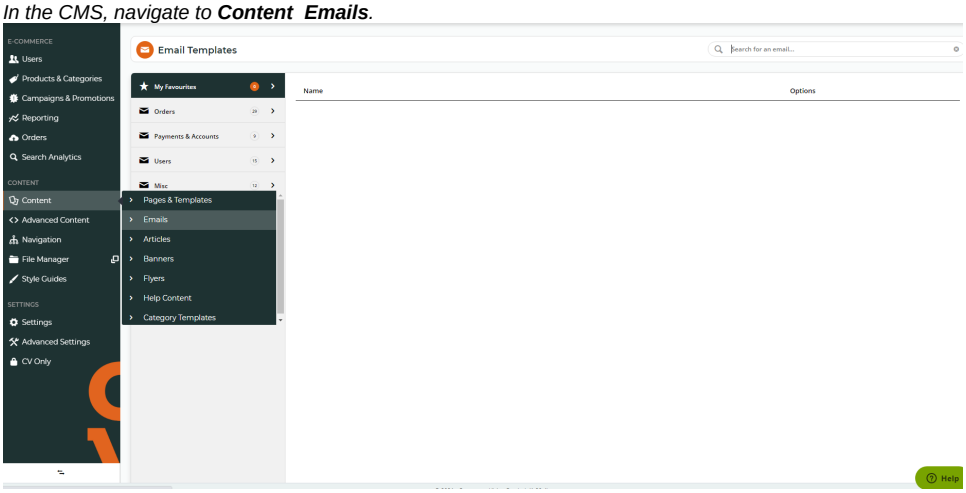
These email templates are easy to maintain in the CMS by a site Administrator.

A list of the major email templates used is provided at the end of this article. Note that some templates may not appear in your CMS if the associated feature is not in use. To explore all email templates available, navigate to **Content Emails** and click a subcategory menu.

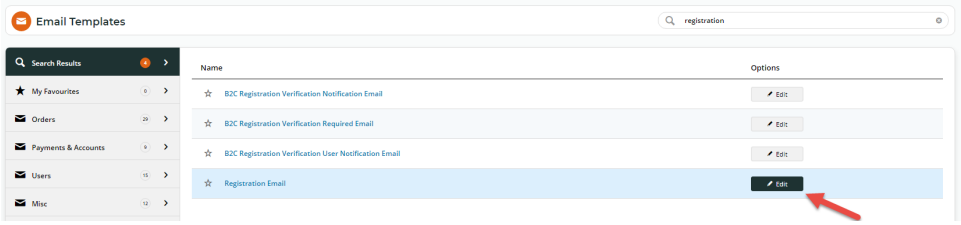


Step-by-step guide

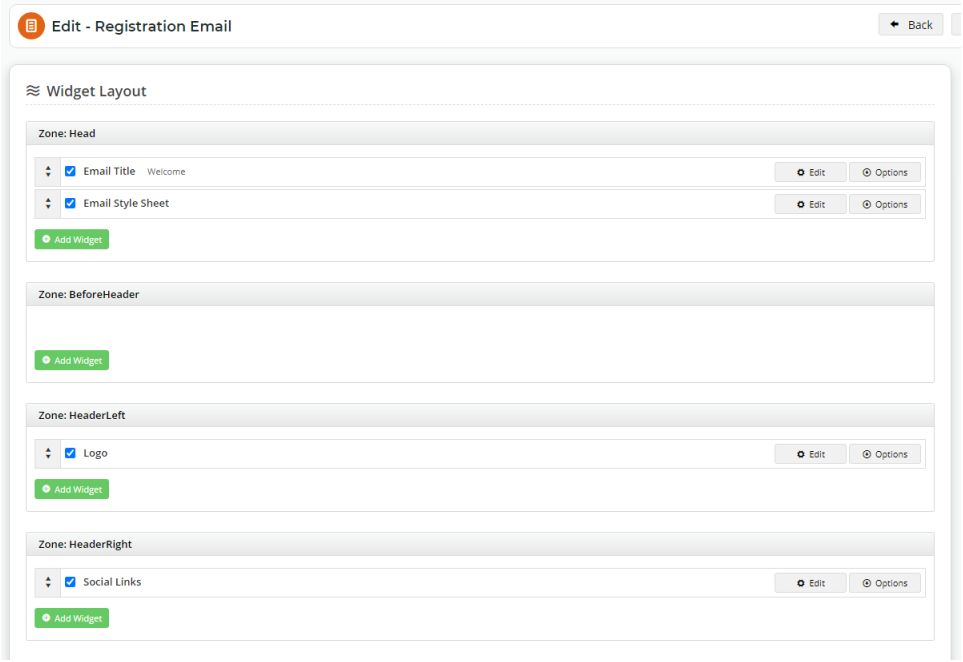
1. *In the CMS, navigate to **Content Emails**.*



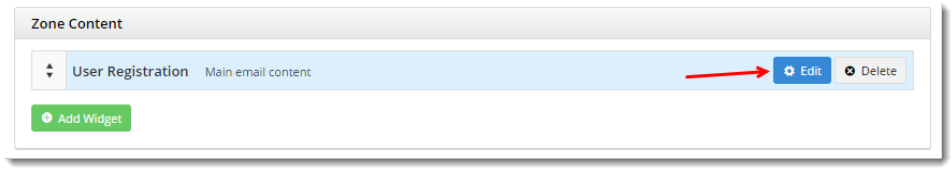
2. *Select the sub-menu with the template you require. If you do not know where it is, you can enter keywords in the Search tool. (In this example, we'll edit the 'Registration Email' so we type in 'registration' in Search.)*



3. *Once you have found the email template, click **Edit**. The list of widgets organised in zones in the template will be displayed.*



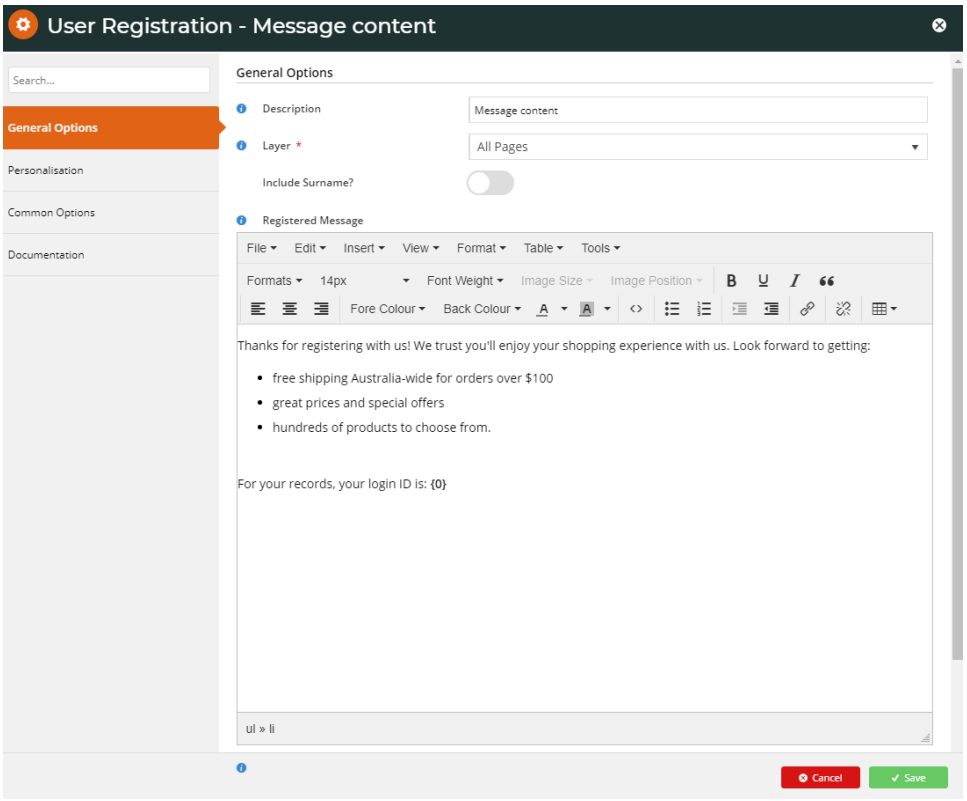
4. *To change options and/or content of a widget, click **Edit** next to the required widget.*



5. *In the widget popup, change available options and content as required. What you can change depends on the widget. (In our example, the User Registration widget is responsible for rendering the main body of the email so we are able to edit the message and whether the surname should be included in the greeting.)*

   There are also fields that appear in every widget:

   - ***Description** - A reference for the Administrator, the description appears on the widget list page and can inform the user about the widget's content at a glance.*
   - ***Layer** - N/A for email templates. Leave as 'All Pages'.*



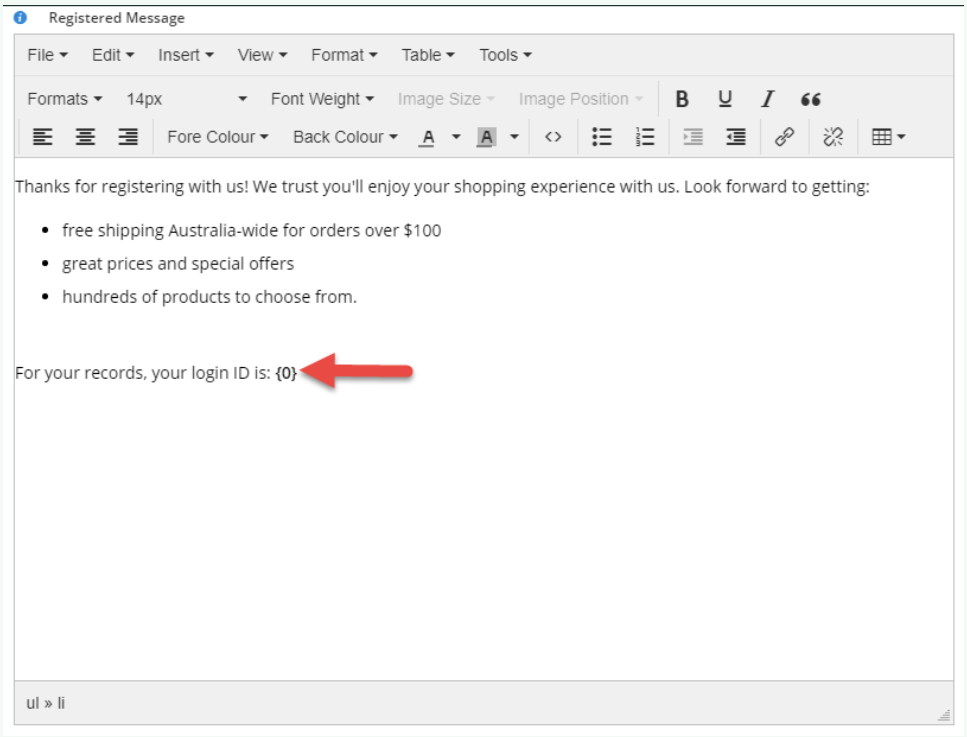
6. *After you are finished, click **Save** to save your changes!*

Placeholders

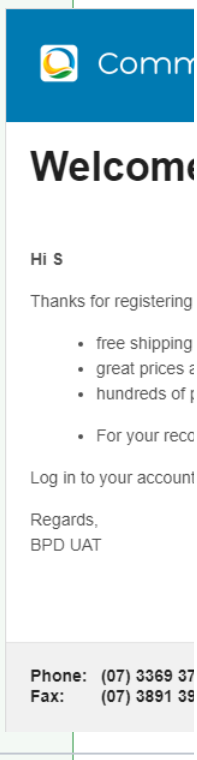
TIP: *Placeholders such as '{0}' appear sometimes in the default message or phrase. In the actual email message, a placeholder will be replaced by relevant context-sensitive data. For instance, the placeholder in our example, {0} will be replaced with a specific user's Login ID.*

- ***NOTE -*** *A placeholder will trigger content or data specific to the field it is used in. {0} in another field will not always display a user's Login ID. If you are unsure what data will be triggered by a placeholder, refer to the specific widget's documentation page.*

In Widget

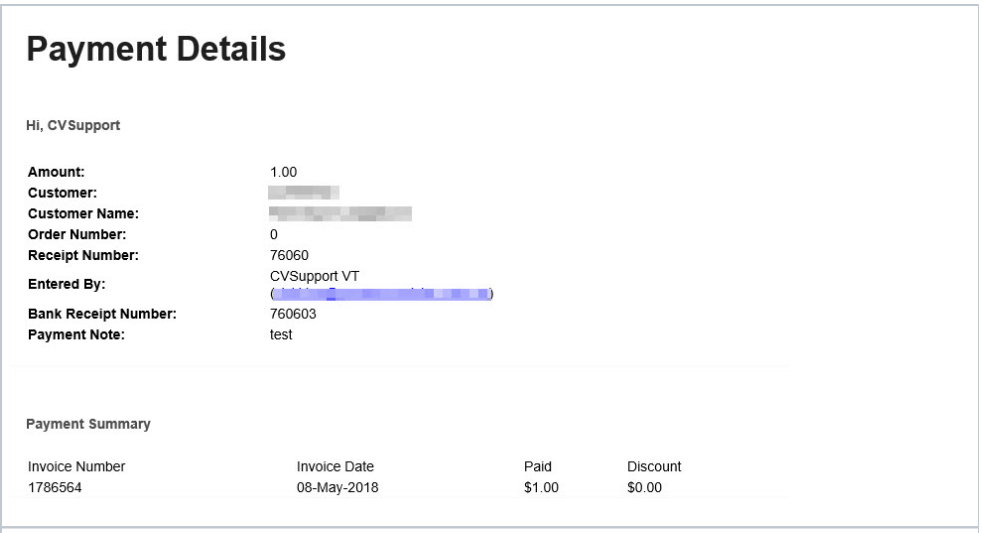
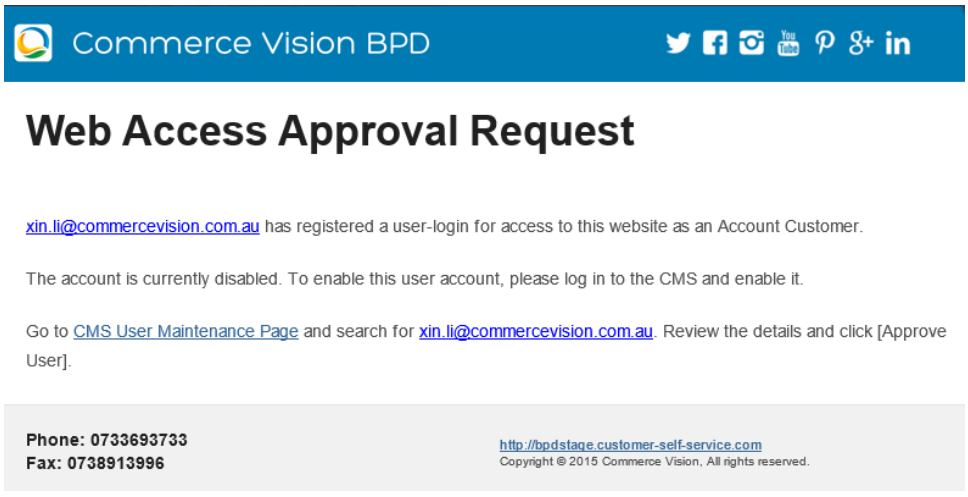
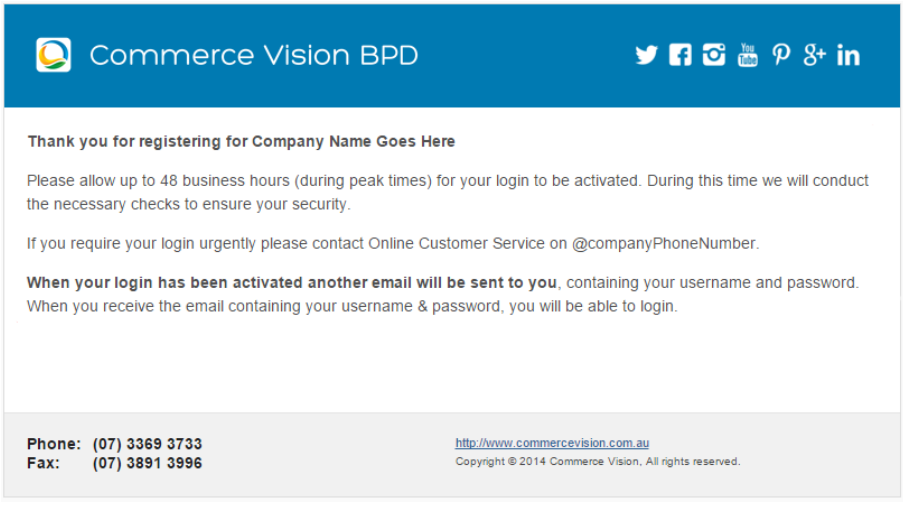


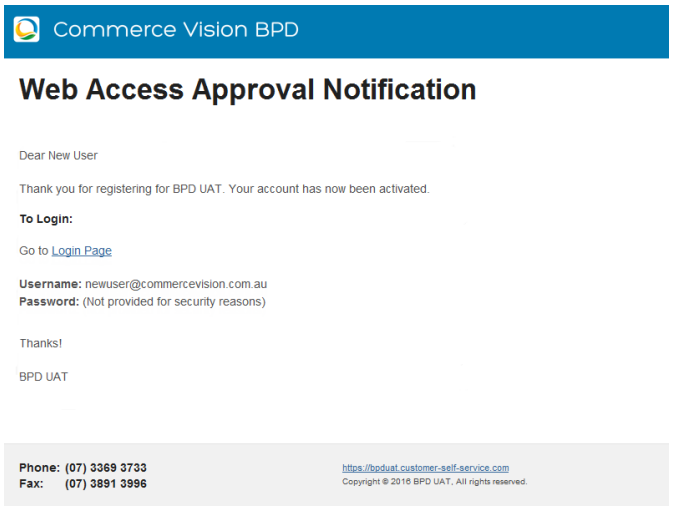
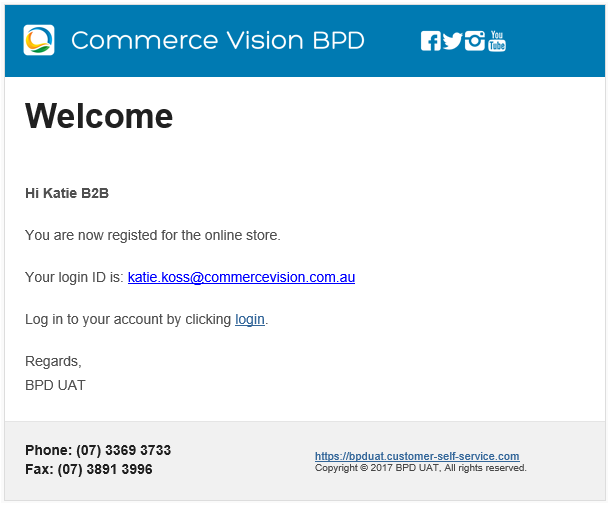
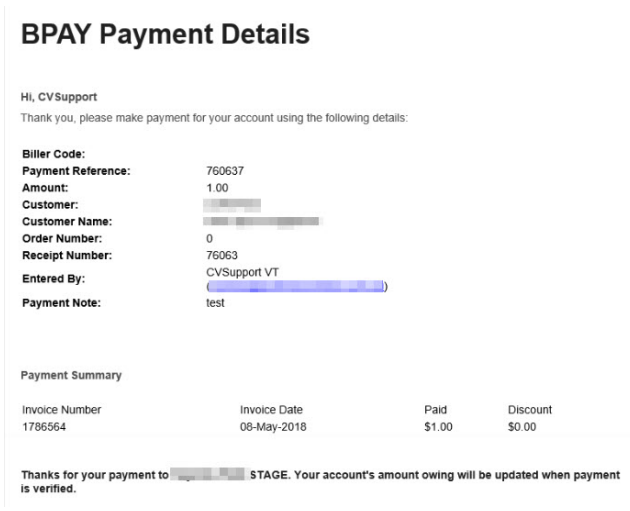
In Email

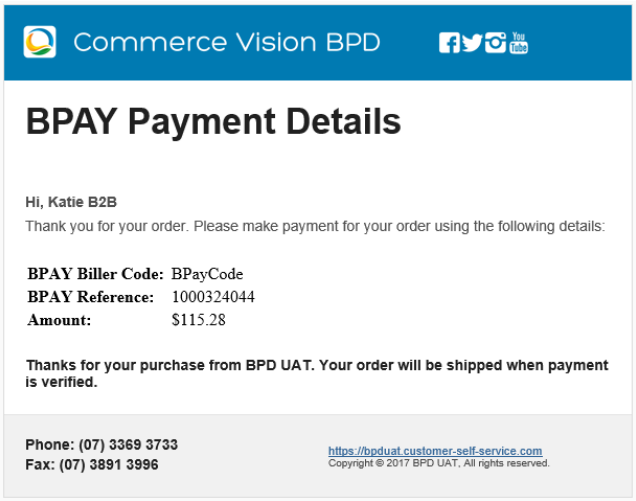
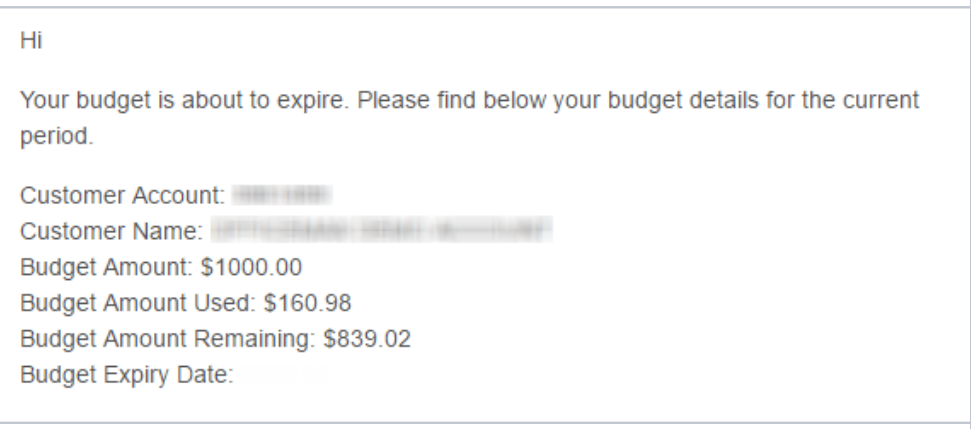
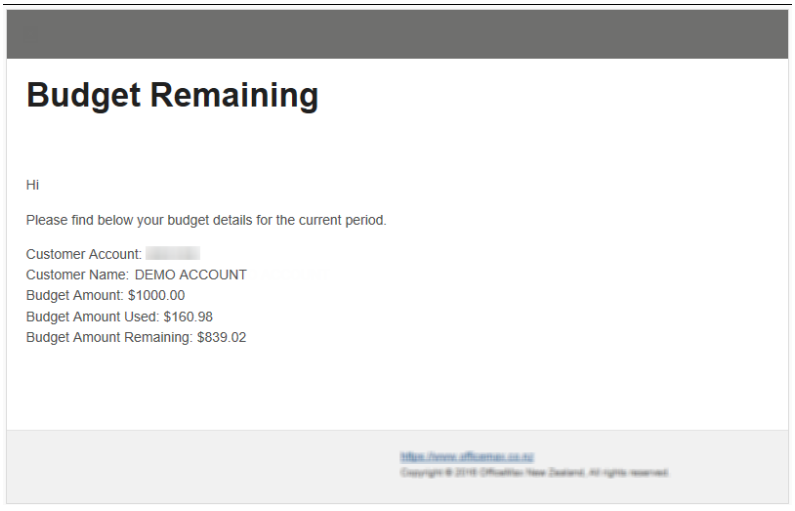


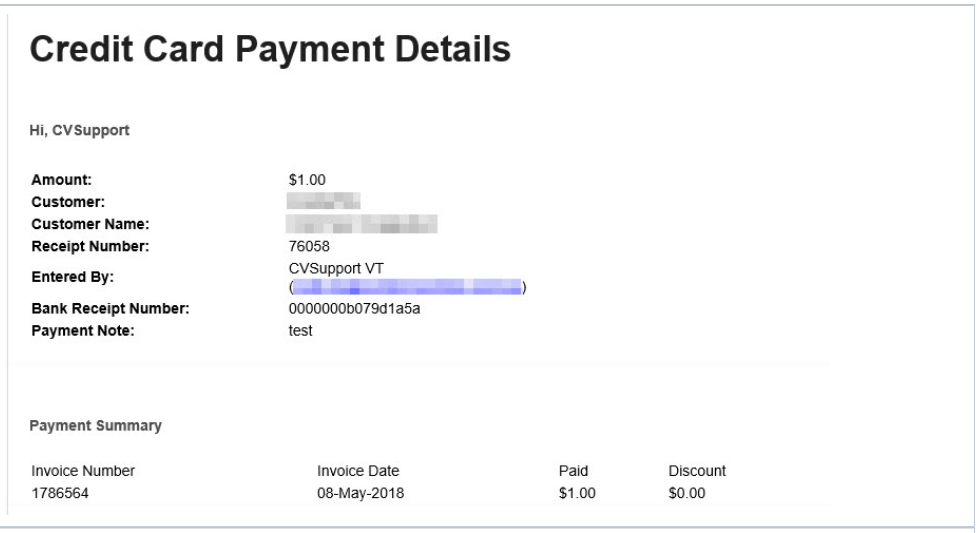
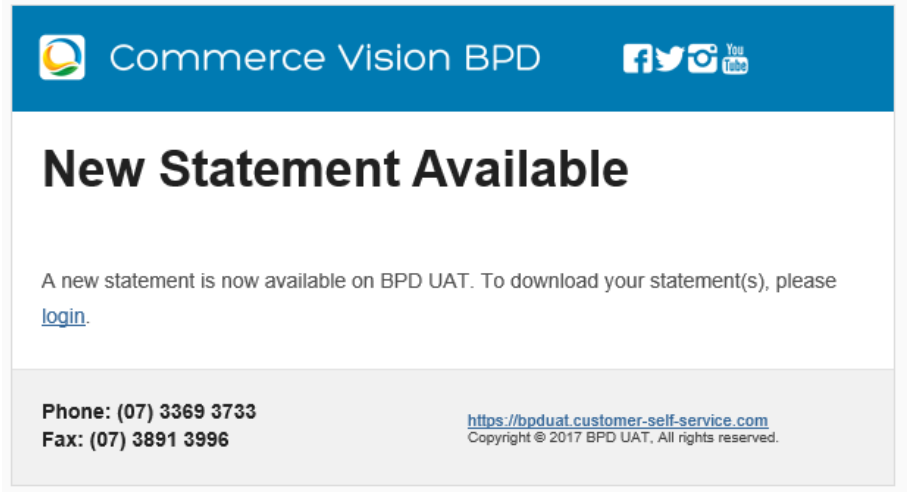
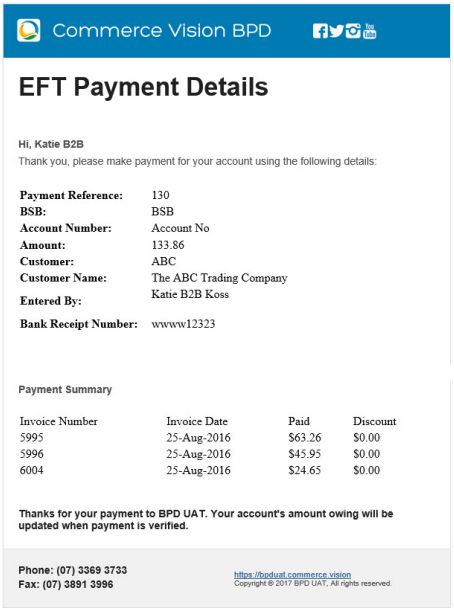
BPD Email Templates

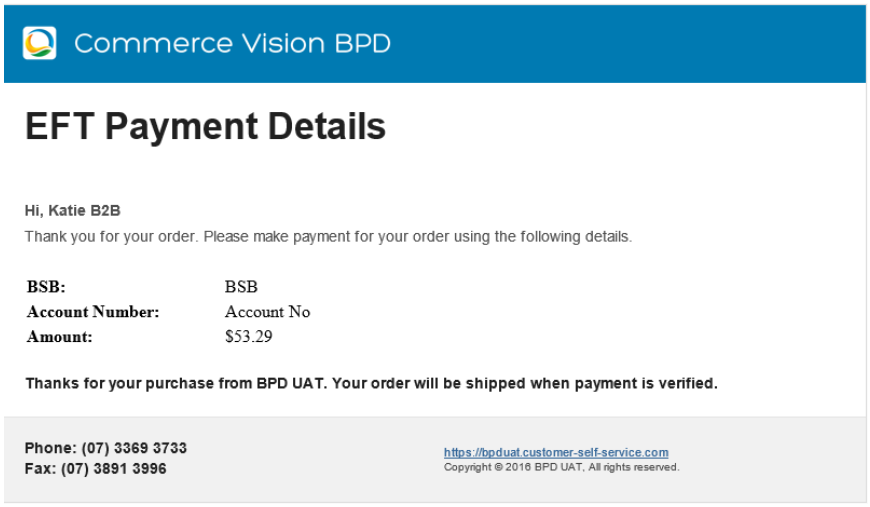
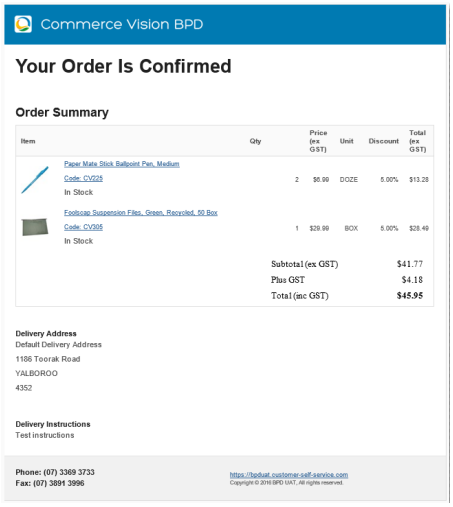
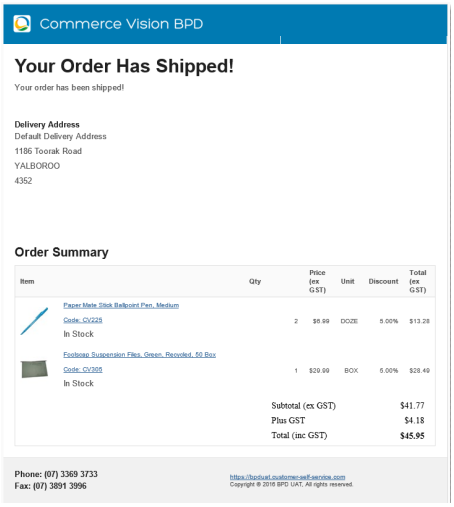
Template Name	Description of Use	Intended Audience	Sample (click to enlarge)

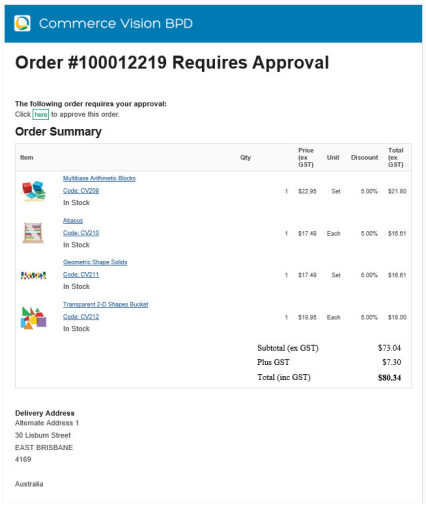
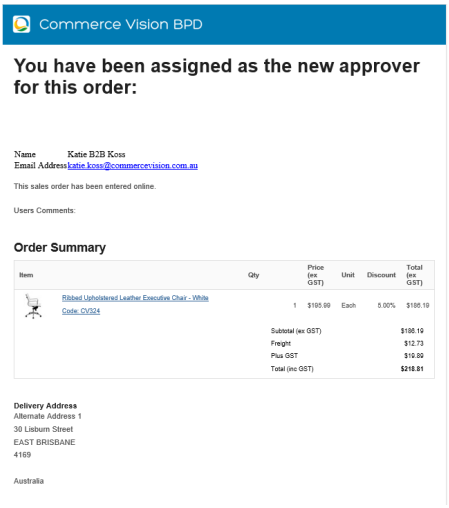
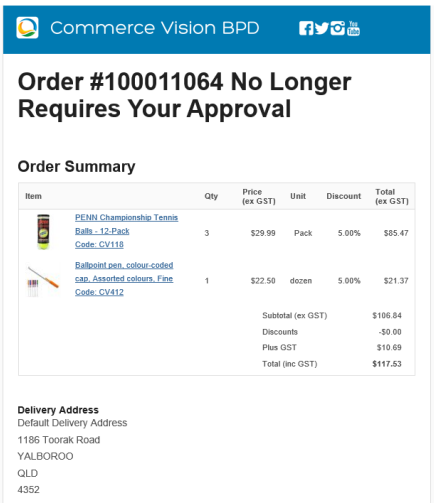
Account Payment	Sent to the user when a payment has been made against a Customer account.	B2B	
Alerts	Sent to the user when they have new alerts associated with their account.	B2B	
B2B Registration Approval Required (Formerly known as the 'APR Approval Required' email)	Sent to the site Administrator when a user registers via B2B Registration and needs to have their login approved.	Internal	
B2B Registration Submitted (Formerly known as the 'APR Submitted' email)	Sent to the user after they have submitted the B2B registration form. This email acknowledges their registration and advises that their login is awaiting approval by an administrator.	B2B	

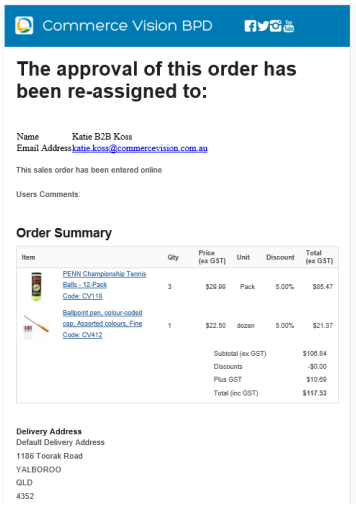
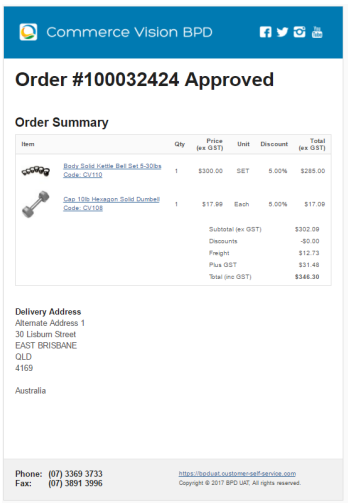
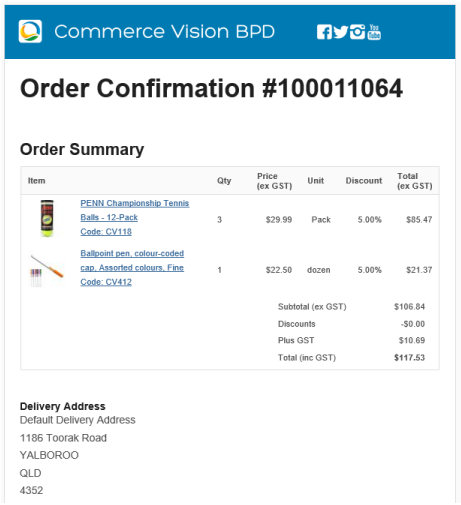
B2B Registration User Notification (Formerly known as the 'APR User Notification' email)	Sent to the newly approved user once their B2B Registration is complete. This email advises that their account has been approved and is active, and confirms their user name.	B2B	
B2B User Creation	The new user registration email sent to B2B users who are created by a site administrator (rather than registering themselves online).	B2B	
BPAY Account Payment	Provides BPAY payment details (Biller Code, Reference, total due) so the user can pay their invoices via direct deposit.	B2B	

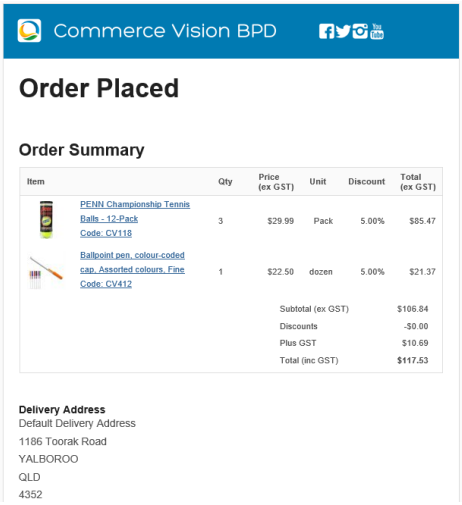
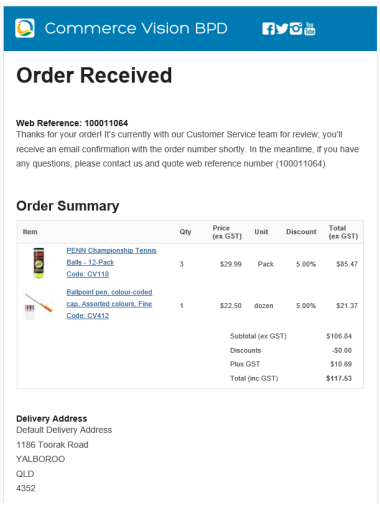
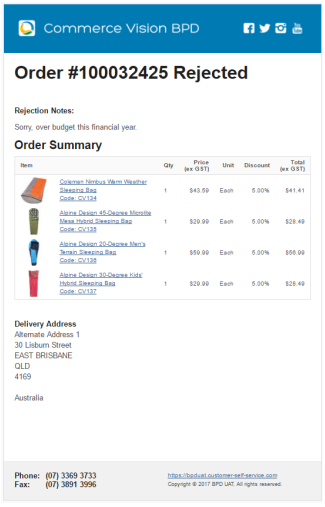
BPAY Payment Detail	Provides BPAY details (Biller Code, Reference, order total) so the user can pay for their recently submitted order.	B2B & B2C	
Budget Expiry Warning	Sent to the user when the expiry date for their budget is near. This email contains details such as account code, budget amount, remaining amount, and expiry date.	B2B	
Budget Remaining	Sent to the user to advise the amount remaining in their budget for the current period. This email contains details such as account code, budget amount, and remaining amount.	B2B	

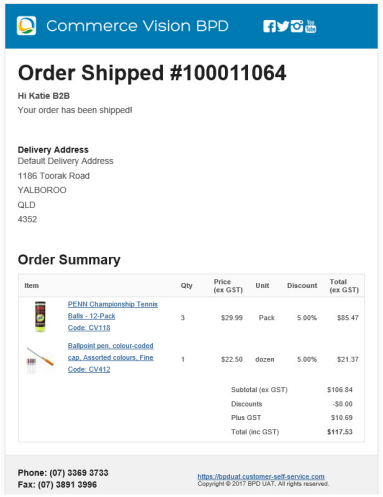
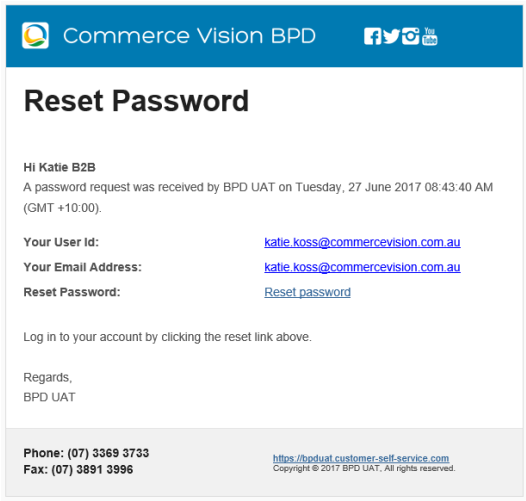
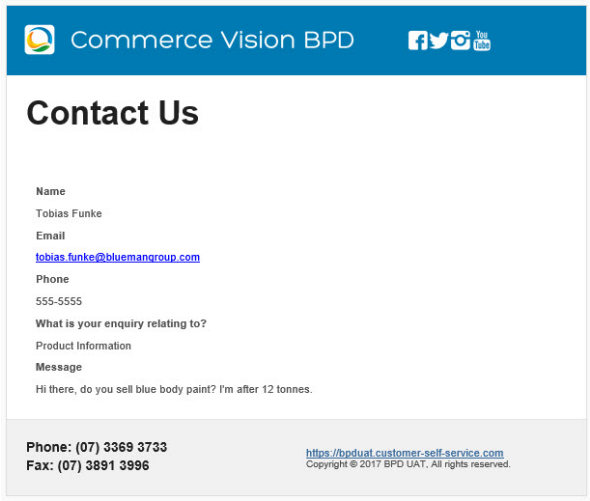
Credit Card Account Payment	Sent to the user as a receipt when they pay off invoices by credit card. Lists invoices paid, invoice date, and amount paid.	B2B	
Customer Statements Available	Advises that a new Customer Statement is available to view. Includes company name and login link.	B2B	
EFT Account Payment	Provides EFT payment details so the user can pay their invoices via direct deposit.	B2B & B2C	

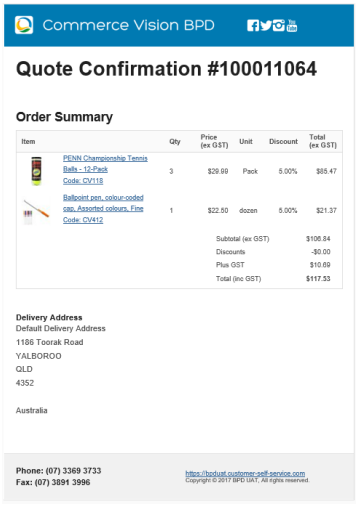
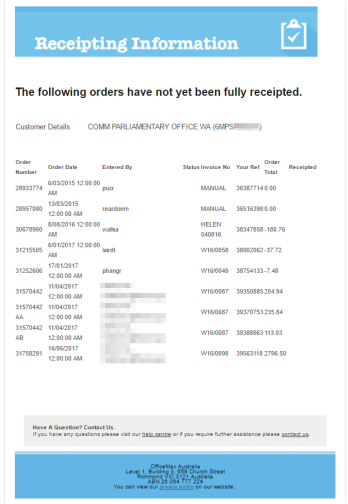
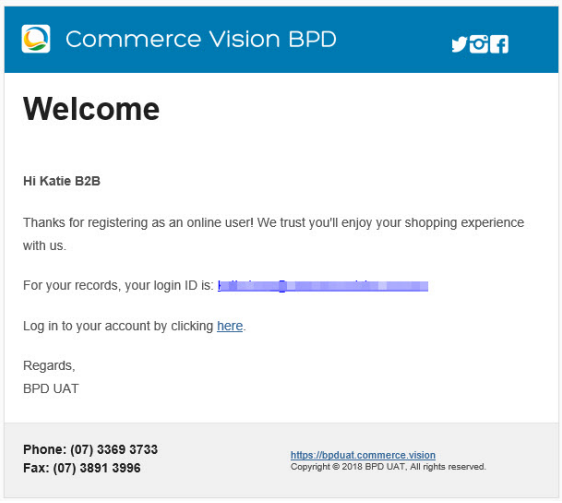
EFT Payment Detail	Provides EFT payment details so the user can pay for their recently submitted order.	B2B & B2C	
Offline Order Confirmation	The order confirmation email sent for offline orders (i.e. not originating from the website, but keyed directly into the ERP). For use with Off line Order Emails.	B2B	
Offline Order Shipped	The order shipped email sent for offline orders (i.e. not originating from the website, but keyed directly into the ERP). For use with Off line Order Emails.	B2B	

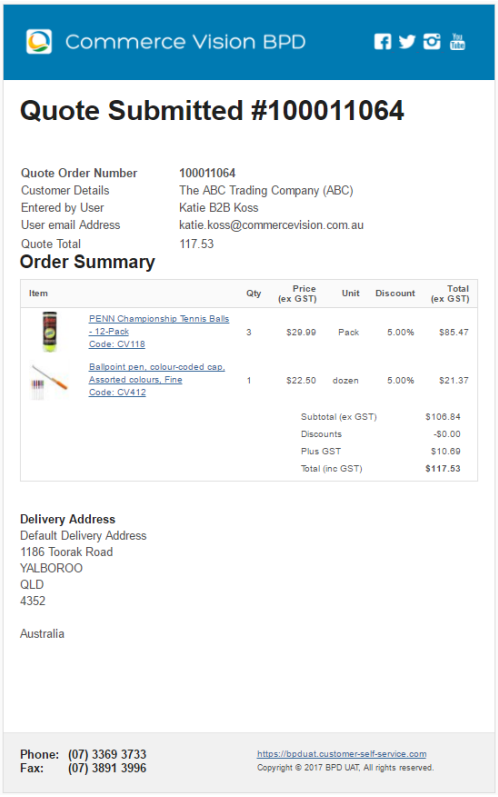
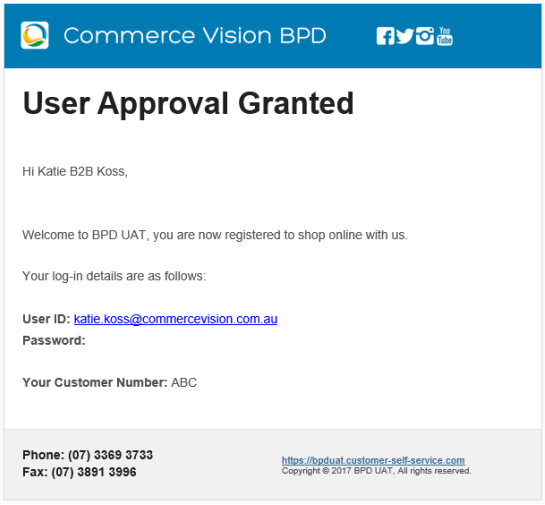
Order Approval Email	Sent to the Approver to advise that an outstanding order requires their approval. Depending on site configuration, the email will either contain the Approve & Reject buttons, or a link to the website with a prompt to login and action the order.	B2B	
Order Approval New Approver	Sent to the newly selected Approver for an order that is still on 'Awaiting Approval' status.	B2B	
Order Approval No Longer Required	Sent to the nominated Approver when the order no longer requires their attention. This could be due to the order being approved / rejected by someone else, or the user cancelling the order.	B2B	

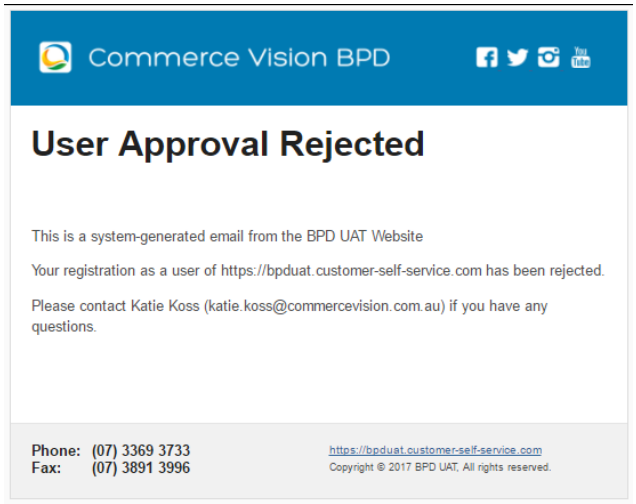
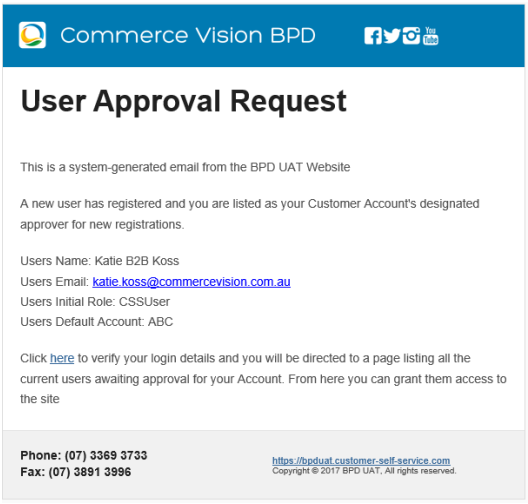
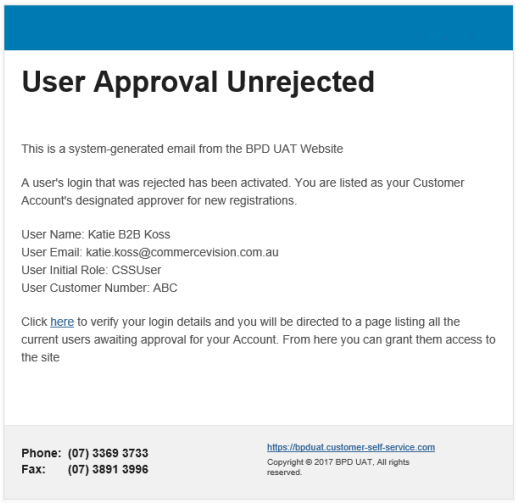
Order Approval Replaced Approver	Sent to the original Approver to advise that the user has selected a *new* Approver for an order that is still on 'Awaiting Approval' status.	B2B	
Order Approved	Sent to the user to advise that their order has been approved.	B2B	
Order Approver Proxy Approved	Sent to the user to advise that their order has been approved by a Proxy.	B2B	
Order Confirmation	Sent to the user to confirm that their order has been received by the system.	B2B and B2C	

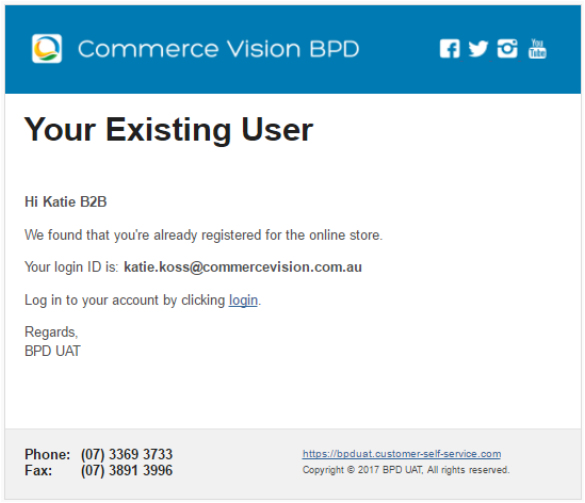
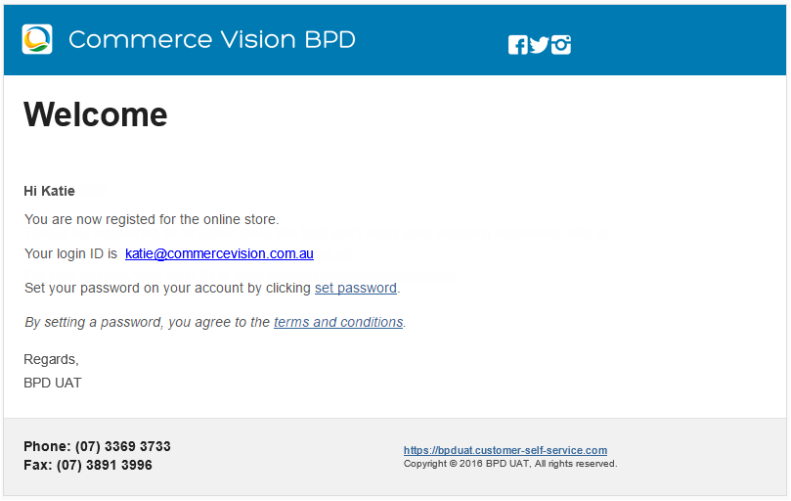
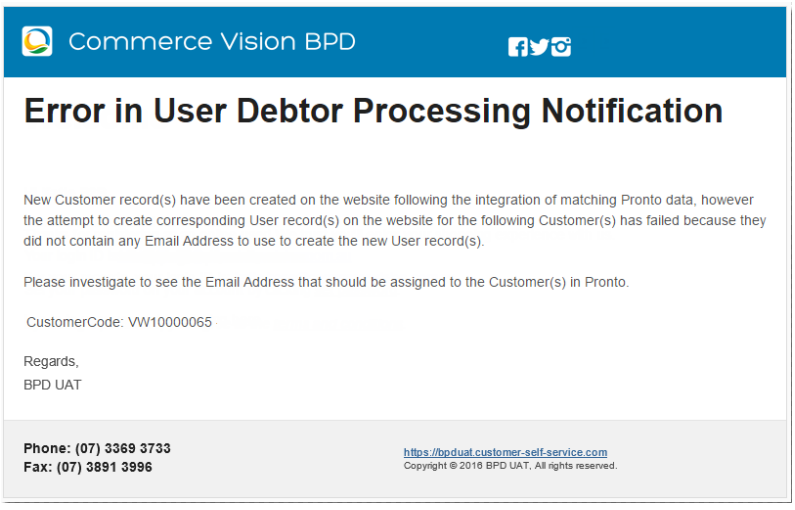
Order Placed	Sent to the Customer Service team or other admin whenever a user places an order online.	Internal	
Order Received	This email can be sent to the user prior to the standard Order Confirmation email. It serves to notify them that their order has been received and is currently being reviewed.	B2B and B2C	
Order Rejected	Sent to the user to advise that the Approver has rejected their order. This email includes the rejection reason (entered by the Approver at the time of rejection). Note - the order lines can be displayed in the rejected email by enabling 'Show Rejected Order Lines' on the E mail Order Summary widget. If this option isn't enabled, the email will just contain the order number, rejection notes, and delivery information.	B2B	

Order Shipped	Sent to the user to advise that their online order has been dispatched.	B2B & B2C	
Order Shipped Pickup Ready	Sent to the user to advise that their online pickup order is ready to be collected from the store location.	B2B & B2C	
Password Recovery	The 'forgot password' email sent to the user, containing the password reset message and link.	B2B & B2C	
Questionnaire Results	The response to a web form (e.g. 'Contact Us'), sent to the site Administrator (or other internal recipient).	Internal	

Quote Confirmation	Sent to the user who requests a quote at checkout. This email follows the format of the Order Confirmation email, but inserts the word 'quote' and uses the web quote number for reference.	B2B	
Receipting Information	Sent to the customer to advise of outstanding orders for their account. This email includes the customer code, order number, date, invoice number, and amounts ordered and receipted.	B2B	
Registration	The welcome email sent to new B2C users who self-register on the site.	B2C	

Standard Quote Submitted	Sent to your Customer Service team, sales rep, or other admin when a customer requests a quote on their shopping cart contents.	Internal	
User Approval Granted	This email is triggered when a new B2B user is approved for web access.	B2B	

User Approval Rejected	Sent to the rejected user when their web access request has been denied. This email includes the name and email address of the approving / rejecting user administrator.	B2B	
User Approval Request	Sent to the designated B2B User Admin when a new user requests web access. This email includes details of the new user and directs the administrator to login and approve or reject.	B2B	
User Approval Unrejected	Sent to the designated B2B User Admin when a previously rejected B2B user is granted web access. This email includes details of the new user and directs the administrator to login and update access levels if required.	B2B	

User Exists	Sent to an existing user to advise that they already have an online account. Includes the user's user name. For use with User Debtor Integration.	B2C (occasionally B2B)	
User Debtor New User (Formerly known as the 'User For Customer Registration' email)	Sent to the new user after they have made a purchase in store and, as a result, been registered for a web account. For use with User Debtor Integration.	B2C (occasionally B2B)	
User Debtor Warning / Error (Formerly known as the 'User For Customer Warnings' email)	Sent to the Customer Service team or other admin when there is a conflict or duplication beween the ERP and the web re: users or accounts. For use with User Debtor Integration.	Internal	

Additional Information

Examples are Order Confirmation, Order Shipped, Password Recovery and New User Registration email templates, and many more.

Minimum Version Requirements	**.**.**

Prerequisites	--
Self Configurable	Yes
Business Function	Email & Communications
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Email Template List
- Widget-Based Email Templates
- Email Style Sheet Widget

Related widgets

- Quote Reminder Email Information Widget
- B2B Registration Rejected Customer Email Template Widget
- Inactive User Warning Email Content Widget
- Inactive User Reminder Email Content Widget
- User Deactivated Notification Email Content Widget
- B2C Registration Verification User Notification Email Widget
- Expired Quote Usage Request Email Information Widget
- Email Company Information Widget
- Email Delivery Instructions Widget
- Email Order Comments Widget
- Email Order Summary Widget
- Email Style Sheet Widget
- Email Title Widget
- Alerts Email List Widget
- Alerts Email Message Widget
- Email Order Address Widget
- Receipting Information Email Message Widget
- Account Activation Email Content Widget
- Email Order Track Details Widget
- Email Title Offline Order Widget