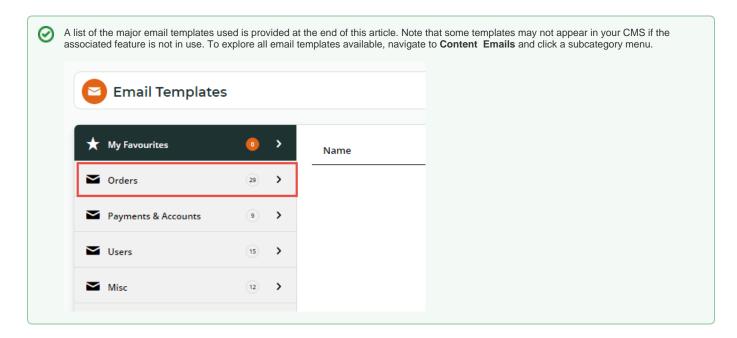
Widget-Based Email Templates

Overview

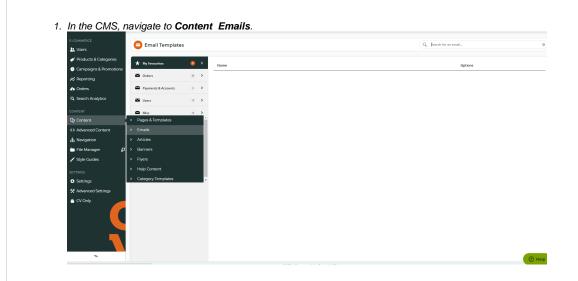
On implementation of a Best Practice Design (BPD) website, several email templates are configured for use out of the box. These include:

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

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



Step-by-step guide



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.)

Email Templates			Q registration
Q Search Results	• •	Name	Options
★ My Favourites	• •	* B2C Registration Verification Notification Email	/ Edit
Orders		☆ B2C Registration Verification Required Email	/ Edit
Payments & Accounts	۲	* B2C Registration Verification User Notification Email	✓ Edit
Users	(B) >	🖈 Registration Email	✓ Edit
Misc M	•		

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

B Edit - Registration Email	 ■ Ba
≅ Widget Layout	
Zone: Head	
Email Title Welcome	• Edit • Options
🗧 🗹 Email Style Sheet	C Edit O Options
Add Widget	
Zone: BeforeHeader	
Add Widget	
Zone: HeaderLeft	
🗘 🗹 Logo	Edit Options
• • • • • • • • • • • • • • • • • • •	o cont
Add Widget	
Zone: HeaderRight	
🗧 🗹 Social Links	• Edit • Options
Add Widget	

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

Zone	e Content	
\$	User Registration Main email content	Edit ODelete
•	Add 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'.

😳 User Registratio	n - Message content		8
Search	General Options		- 1
General Options	 Description Layer * 	Message content All Pages	
Personalisation	Include Surname?		1
Common Options	Registered Message		.
Documentation	E E E Fore Colour ▼ Ba	Weight ▼ Image Size ◆ Image Position ◆ B U I 66 ck Colour ▼ A ▼ I ↔ III IIII IIII IIII IIII IIII IIIII IIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
	0		4
		Sancel Sancel	e

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

TIP: Placeholders such as '{0}' appear sometimes in the default message or phrase. In the actual emplaceholder will be replaced by relevant context-sensitive data. For instance, the placeholder in our extreplaced 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 anoth always display a user's Login ID. If you are unsure what data will be triggered by a placehold specific widget's documentation page. 	
In Widget	In Email
Registered Message	
File ▼ Edit ▼ Insert ▼ View ▼ Format ▼ Table ▼ Tools ▼ Formats ▼ 14px ▼ Font Weight ▼ Image Size ▼ Image Position ▼ B U I 66 E E E Fore Colour ▼ Back Colour ▼ A A A ↓	
 Thanks for registering with us! We trust you'll enjoy your shopping experience with us. Look forward to getting: free shipping Australia-wide for orders over \$100 	Wel
great prices and special offers	Hi S
hundreds of products to choose from.	Thanks fo
For your records, your login ID is: {0}	• f • <u>c</u> • t
	• F
	Log in to
	Regards, BPD UAT
	Phone: Fax:

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	Payment Deta Hi, CVSupport Amount: Customer: Customer Name: Order Number: Receipt Number: Entered By: Bank Receipt Number: Payment Note: Payment Summary Invoice Number 1786564	AIIS 1.00 1.00 0 76060 CVSupport VT (Constrained on the second of	Paid \$1.00	Discount \$0.00	
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	Web Acces		access to this v t, please log in t mercevision.co	vebsite as an Account Custom o the CMS and enable it.	er.
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	Thank you for registering f Please allow up to 48 busines the necessary checks to ensu If you require your login urge When your login has been	ntly please contact Online Customer 4 activated another email will be sen containing your username & password	Service on @com It to you, contain d, you will be able www.commercevision.co	npanyPhoneNumber. ning your username and passwo e to login.	duct

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	Commerce Vision BPD Web Access Approval Notification Dear New User Thank you for registering for BPD UAT. Your account has now been activated. To Login: Go to Login Page Username: newuser@commercevision.com.au Password: (Not provided for security reasons) Thanks1 BPD UAT
			Phone: (07) 3369 3733 <u>https://baduat.oustomer-self-service.com</u> Fax: (07) 3891 3996 Copyright © 2016 BPD UAT, All rights reserved.
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	Image: Weissing and the contract of the contra
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 Details Hi, CVSupport Thank you, please make payment for your account using the following details: Biller Code: Payment Reference: Payment Reference: Customer: Customer Name: Order Number: Order Number: Order Number: Order Number: Over Name: Payment Note: Decount Thanks for your payment to Over Any-2018 \$1.00 Store: Thanks for your payment to

BPAY Payment Detail	Provides BPAY details (Biller Code, Reference, order total) so the user can pay for their recently submitted order.	B2B & B2C	Commerce Vision BPD If Y O IS BPAY Payment Details Hi, Katie B2B Thank you for your order. Please make payment for your order using the following details: BPAY Biller Code: BPayCode BPAY Reference: 1000324044 Amount: x S115.28 Thanks for your purchase from BPD UAT. Your order will be shipped when payment is verified. Phone: (07) 3269 3733 Ext: (07) 3891 3296
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	Hi Your budget is about to expire. Please find below your budget details for the current period. Customer Account: Customer Name: Budget Amount: \$1000.00 Budget Amount Used: \$160.98 Budget Amount Remaining: \$839.02 Budget Expiry Date:
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	HI Please find below your budget details for the current period. Customer Account Customer Name: DEMO ACCOUNT Budget Amount: \$1000.00 Budget Amount Used: \$160.98 Budget Amount Remaining: \$839.02

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: Customer Name: Receipt Number: 7 Entered By: (Bank Receipt Number: 0	2700000000079d1a5a est	ails		
			Invoice Number 1786564	Invoice Date 08-May-2018	Paid \$1.00	Discount \$0.00	
Customer Statements Available	Advises that a new Customer Statement is available to view. Includes company name and login link.	B2B	Commerce New Stater A new statement is now availogin.	ment A	vailable		ase
			Phone: (07) 3369 3733 Fax: (07) 3891 3996		https://bpduat.custome Copyright © 2017 BPD U	er-self-service.com AT, All rights reserved.	
EFT Account Payment	Provides EFT payment details so the user can pay their invoices via direct deposit.	B2B & B2C	5995 25-Aug-2016 5 5996 25-Aug-2016 5 6004 25-Aug-2016 5 Thanks for your payment to BPD UAT. Your account's a updated when payment is verified. 5	Paid Discount \$63.26 \$0.00 \$45.95 \$0.00 \$24.65 \$0.00			

EFT Payment Detail	Provides EFT payment details so the user can pay for their recently submitted order.	B2B & B2C	<section-header> EFT Payment Details Hi, Katie B2B Thank you for your order. Please make payment for your order using the following details. BSB: BSB Account Number: Account No. Amount: S 53.29 Thanks for your purchase from BPD UAT. Your order will be shipped when payment is verified. Phone: (07) 3369 373? Eax: (07) 3369 373?</section-header>
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	<section-header> Connecce Vision BPD Coac Carder is Confirmed Dread Summary Void Carder is Confirmed Dread Summary Void Carder is Confirmed Void Carder Void Carder is Confirmed Void Carder is Confirmed Void Carder Void Carder</section-header>
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	<section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header>

Order Approval	Sent to the Approver to		Commerce Vision BPD
Email	Approve 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.		<section-header> Character 40000122219 Requires Approval Example upder require up any encents Terminal upder requires the status Corr Summary Terminal upder requires the status Since Actions Sinc</section-header>
Order Approval New Approver	Sent to the newly selected Approver for an order that is still on 'Awaiting Approval' status.	B2B	Commerce Vision BPD You have been assigned as the new approver for this order: Xee: Keit B2B Kos Zent Addression Long Commerce Vision Com at This sele order has been entered order. User Commerce: Order Summary: Reder Materia Code: Discourse Code: Reder Materia Code: Discourse Code: Discourse Code: Reder Materia Code: Discourse Code: User Source Discourse Code: Materia Discourse Code: Discourse Code: Materia Code: Discourse Code: Discourse Code: Materia Code: Discourse Code: Discourse Code: Materia Code: Discourse Code: <thdiscourse code:<="" th=""></thdiscourse>
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	Commerce Vision BPD Image: Commerce Vision BPD Order #1000111064 No Longer Requires Your Approval Order Summary Image: Commerce Vision BPD Image: Commerce Vision BPD Image: Commerce Vision BPD Order #1000111064 No Longer Requires Your Approval Order Summary Image: Commerce Vision BPD Image: Commerce Vision BPD <t< td=""></t<>

Order Approval Replaced Approver	Sent to the original Approver to advise that the user has selected a <i>new</i> Approver for an order that is still on 'Awaiting Approval' status.	B2B	Commerce Vision BPD< ₽₽€
Order Approved	Sent to the user to advise that their order has been approved.	B2B	<image/> Commerce Vision BPD III IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
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	Commerce Vision BPD Image: Commerce Vision BPD Coder Confirmation #1000011064 Order Summary Image: Concorded code Code Code Code Code Code Code Code C

Order Placed	Sent to the Customer Service team or other admin whenever a user places an order online.	Internal	Commerce Vision BPD Image: Commerce Vision BPD Order Placed Dread Summary Image: PENIC Chargeonship Tennis Ratin_LDPanis 3 Image: PENIC Chargeonship Tennis Code: CV112 3 Image: PENIC Chargeonship Tennis Code: CV112 3 Subtobal (sex OST) 500% Subtobal (sex OST) 500% Panis Chargeons Code: CV112 3 Subtobal (sex OST) 510.89 Testal (sec OST) 510.89 Testal (sec OST) 517.55 Default Delivery Address 1 116 Toorak Road 3 20L 352
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	<section-header> Commerce Vision BPD Color Dials for your order ITs currently with our Customer Service Iteam for freierex you't necesive an enact continuation with the meanine, if you have any questions, please contact us and quote web reference number (100011064). Dials for your order ITs currently with our Customer Service Iteam for freierex you't necesive an enact of media web reference number (100011064). Dials for your order ITs currently with our Customer Service Iteam for freierex you't necesive and quote web reference number (100011064). Dials for your order ITs currently with our Customer Service Iteam for freierex you't necesive freieres for the service freiere for the service for the service</section-header>
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 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	Commerce Vision BPD Image: Big: Big: Big: Big: Big: Big: Big: Big
			Telde (dec GST) \$117.43 Phone: (07) 3369 3733 philo: (bit dec decidence and acceler cannel Copyright 6 2017 BPD Link. All right meaned.
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	Commerce Vision BPD Image: Commerce Vision BPD Bassword request was received by BPD UAT on Tuesday, 27 June 2017 08:43:40 AM (GMT +10:00). Your User Id: katle koss@commercevision.com.au Your Email Address: katle koss@commercevision.com.au Reset Password: Reset password Log in to your account by clickling the reset link above. Regards, BPD UAT Phome: (07) 3369 3733 Prome: (07) 3369 3733
Questionnair e Results	The response to a web form (e.g. 'Contact Us'), sent to the site Administrator (or other internal recipient).	Internal	<section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><text></text></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>

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	Commerce Vision BPD Commerce Vision BPD Counce Confirmation #100011064 Drear Summary Image: Counce Vision BPD Very Counce Vision BPD Very Counce Vision BPD Very Counce Vision BPD Image: Counce Vision BPD Very Counce Vision BPD
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	<section-header><section-header><section-header><section-header><section-header><section-header><section-header><image/></section-header></section-header></section-header></section-header></section-header></section-header></section-header>
Registration	The welcome email sent to new B2C users who self- register on the site.	B2C	Commerce Vision BPD Welcome Hi Katie B2B Thanks for registering as an online user! We trust you'll enjoy your shopping experience with us. For your records, your login ID is: For your records, your login ID is: Log in to your account by clicking here. Regards, BPD UAT Phone: (MT) 3369 3733 Mathematical Commerce vision Commerce 1018 BPD UAT

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	Commerce Vision BPD Image: Image
			Discurds -90.00 Plus GST \$10.80 Total (Inc GST) \$117.53 Delivery Address Default Delivery Address T166 Toorak Road YALBOROO QLD 4352 Australia Phome: (07) 3369 3733 Fax: (07) 3891 3396 Copyright © 2017 BPD UAT, All rights meaned.
User Approval Granted	This email is triggered when a new B2B user is approved for web access.	B2B	Commerce Vision BPD Image: Commerce Vision BPD User Approval Granted Hi Katle B2B Koss, Welcome to BPD UAT, you are now registered to shop online with us. Your log-in details are as follows: User ID: kalle koss@commercevision com au Password: Your Customer Number: ABC Phone: (07) 3369 3733 Fax: (07) 3891 3996

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	Image: With the service of the ser
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	Image: Second secon
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 Approval Unrejected This is a system-generated email from the BPD UAT Website A user's login that was rejected has been activated. You are listed as your Customer Account's designated approver for new registrations. User Name: Katle B2B Koss User Famili Role: CSSUser User Customer Number: ABC Olick here to verify your login details and you will be directed to a page listing all the current users availing approval for your Account. From here you can grant them access to the site Phone: (27) 3389 9723 Phone: (27) 3389 9723 Phone: (27) 3389 9723

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 Us er Debtor Integration.	B2C (occasionally B2B)	Image: We found that you're already registered for the online store. Your login ID is: katie.koss@commercevision.com.au Log in to your account by clicking login. Regards, BPD UAT Phome: (M7) 3369 3733 Exter://brdutat costonersestifiserios.com Corright @ 2017 BPD UAT, All rights reserved.
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 Us er Debtor Integration.	B2C (occasionally B2B)	Image: (01) 3031 3330 Commerce Vision BPD Image:
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 Us er Debtor Integration.	Internal	Image: With the second sec

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 ListWidget-Based Email Templates
- Email Style Sheet Widget

Related widgets

- Quote Reminder Email Information WidgetB2B Registration Rejected Customer Email Template 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 Instrume Widget

- Email Delivery Instructions Widget
- Email Order Comments Widget
 Email Order Summary Widget
- Email Style Sheet 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 Officie Order Widget
- Email Title Offline Order Widget