PaySimple | Quick Guides

How To Add, Modify, or Delete Email Templates

About Email Templates

With the PaySimple Solution 2.0, you can send customers email receipts for processed transactions, advance notices of upcoming transactions, and confirmations of their billing details.

We provide a set of pre-configured email templates for you to edit according to your communication preferences. These emails can be found in **Email Templates**, located under the **System Management** tab, and can contain any text-based content and most system data you wish.

You have the option to send or not send transaction-related receipts, failure notifications, and pre-notification emails. All other emails are automatically sent by the system, such as the password reset email, and will always use the template marked 'default'. You can define alternate templates and change the 'default' at any time.

Each email category must always have a default version defined for it. Deleting the default email for a category does not stop that email from being sent. If you do not want your customers to receive an automatically sent email, then you enter a dummy address (such as a@a.com) into the TO field.

Modifying Email Notifications for Specified Customers

When processing payments you can specify the type of emails sent, and the content of those emails, on a transaction by transaction basis.

Under the **Process Payments** tab, search for and load an existing customer record (or create a new customer and click "Save and Load").

Select the transaction you'd like to perform. On the transaction information screen, expand the **Email Notifications** section by clicking the down arrows to the right.

To *send* email notifications, check the box for each email type you would like to send. One-time transactions provide the option to send receipts and failure notifications. Recurring schedules provide the option to send pre-notifications in advance of the actual payment, in addition to receipts and failure notifications. The will pre-populate the customers email in the **To** field if it was entered into the customer profile.

You can also select the exact email sent for each transaction. The "default" email is selected automatically for each category, and you can choose any alternate email you would like to send. When processing a one-time ACH payment, be certain to select the email that matches the ACH type selected for your transaction. To learn more about ACH payment types, see the How to authorize your ACH transactions Quick Guide.

To *not send* email notifications, leave the box unchecked for any email type you do not wish to send. For example, you may want to send receipts but not send failure notifications, so you would check the **Send Receipt** box, and leave the **Failed Transaction** box unchecked.

Editing an Email Template

You can edit any email templates to customize or personalize them. Review these templates to familiarize yourself with the content your customers and employees are going to see.

To edit an email template:

1. Click **System Management** on the main navigation bar. The **General** page will appear.

2. Click **Email Template** on the navigation links bar.

   The Email Templates page appears, listing all email templates in the system.

   They appear 25 per page, in ascending numeric order, based on ID number. Use the **Page List** or **Next** and **Previous** links at the bottom of the page to access additional templates.

3. To change any email template, click the **Edit** icon. The **Add/Edit Email** page appears for the selected template.

4. Make changes to any of the information on the page. Each required item is denoted by an asterisk (*).

   Tip: You can merge any field in the system under each module from the **Merge Fields** box. To merge fields:

   a) Place your cursor at the position you want the merge field to appear. This can include any section of the email template.
   b) From the drop down menu, choose the module from which you want to pull to populate the merge fields.
   c) Choose which fields to merge by clicking on the link for that field. The merged field name will appear at the spot where you set your cursor.

   Tip: To CC or BCC yourself on any email simply follow the steps above to merge the field under the client module labeled **Client Contact Email** into the CC or BCC fields. Or type your actual email address in the CC and/or BCC fields. You can add more than one email address by separating them with a comma and a space. When the email is generated your customer will see any email address you enter in the CC field, but will not see addresses entered in the BCC field.

5. Once you've completed your changes, click **Save** at the bottom of the page.

   The system refreshes the page, showing the list of email templates and confirming your change was saved.

Adding a New Email Template

You can add additional email templates to the **Email Templates** section under **System Management**. New templates added to a category will be accessible from the drop down menu in the **Email Notification** section of each payment screen and invoice.

1. On the main navigation bar, click **System Management**. The **General** page will appear.

2. On the navigation links bar, click **Email Template**. The Email Templates page appears, listing all available templates.

   They appear 25 per page, in ascending numeric order, based on ID number. Use the **Page List** or **Next** and **Prev** links at the bottom of the page to access additional available templates.

3. Click **Add New Template** at the bottom of the page. A blank **Add/Edit Email** page appears.

4. Define the information on the page for the new template. Each required item is denoted by an asterisk (*). (Note: Email ID is generated by the system. You cannot change this.)

Template Name (required) is the title of the template as it appears in the system. This should always be concise but descriptive.

Description (required) usually matches the name, unless you want to include additional information.

Email Category is a pre-defined list in the system. Click the arrow and select the appropriate category for this template. See Appendix D in the online help system for details on the available Email Categories.

Default for Category (check box) designates the email to be automatically sent by the system, unless an alternate is selected when a transaction is processed.

From (required) is the email address that displays in the "From" field when the email is sent. You can type in your email address. Or, you can merge the **Default Email Address From** field from the Client module, and your From address will be the email **Display Name** programmed on the **Default Email Settings** section of the **General** page.

To (required) is the email recipient's address. You can enter multiple email addresses in any of the email fields by separating them with commas. Typically you will use a merge field for your Customer's email address here.

Mail Merge Fields (optional) To use a mail merge field value in your email, place the cursor where you want the field value to appear in the template. Select a category from the drop down menu, then click the desired field name in the corresponding list.

CC is for additional recipients of this email message.

BCC is for additional recipients of this email message who will not be seen by the other recipients.

Subject displays the subject title of the email message.

Message Body is the content of the email message. This is a plain text email, so be sure to use complete URLs (http://www.anysite.com/anypage.html) if you want to direct the reader to a web page. You can edit the text and insert variable values using Mail Merge Fields.

5. At the bottom of the page, click **Save**.

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