

Feature Overview & Tutorial

# EMAIL EDITOR & SITE TAGS

Create & Assign HTML Email Templates

# Overview

## Email Editor & Site Tags

The **Email Editor** gives you the ability to use the email templates we provide, or to create your own with the help of our **Field Names** and **Data Sources**. You can learn more about these advanced features on slides 14 – 17.

The **Site Tags** tool allows you to assign emails to each individual site. For each site, emails are assigned to a specific event. When that event occurs, the system will automatically send out the email on your behalf. Together, both of these can increase the effectiveness of your Customer Relationship Management.

- Little development is required
- Provided with ready-to-use HTML email templates, just add your logo!
- Option to write your own HTML from scratch
- Customize with **Field Names** that pull information directly from the system

Introduction:

# EMAIL EDITOR

Creating Email Templates

# Email Editor

## What is the Email Editor?

The **Email Editor** gives you access to the full list of HTML email templates we have provided, and those which you have customized and/or created on your own. The next few slides will walk you through the basics of the **Email Editor**.

## Quick Overview

- How to get to the Email Editor (Slide 5)
- Getting Started for New Users (Slide 5)
- Editing a Template (Slide 5)
- The Mail Template Simplified (Slide 6 & 7)
- How to Insert Your Logo into HTML Mail Body (Slide 7)
- Preview the Email Template (Slide 8)

# Email Editor

## Getting Started

On the navigation menu, follow this path to get to the **Email Editor**: Setup > Site Tools > **Email Editor**. You will then see the entire list of email templates. From the list, find the template you wish to use and select “edit”. To follow along with the example used in the following slides, select the Customer Receipt HTML template.

**NEW USERS:** Initially, you will only have the templates we provide to you to choose from, and you will have to select “copy this template” before you can gain editing options. Once you copy the template, the copied version will then be highlighted in green in the list. Find it and select “edit”. To follow along with the example used in the following slides, select the Customer Receipt HTML template.

The screenshot shows the Email Editor interface. On the left is a navigation menu with the following items:

- Setup
  - Account Configuration
    - Manage Users
    - Access Security
    - Credit Cards
    - Check Processing
    - Contact Information
    - Preferences
    - Manage Affiliates
  - Site Tools
    - Site Tags
    - Email Editor**
    - Button Editor
    - Form Editor
  - User Settings
    - Change Password
    - Profile

A red box highlights the 'Email Editor' option in the Site Tools section, and a red arrow points from it to the main content area. The main content area has the heading 'Select mail template to edit, or create new template' and a table of templates:

Title Subject	Data- sources	Size	Action
<b>Client activation A (x)</b> <i>Your Ezic Account is Now Active</i>	A	3564	<a href="#">delete</a>   <a href="#">edit</a>   <a href="#">copy</a>
<b>Client Activation A - Short Version HTML</b> <i>Your \${BRAND_PRODUCT} Account is Now Active</i>	A	8010	<a href="#">delete</a>   <a href="#">edit</a>   <a href="#">copy</a>
<b>Client activation B</b> <i>Welcome to Ezic's Digital Payment System!</i>	A	2996	<a href="#">delete</a>   <a href="#">edit</a>   <a href="#">copy</a>
<b>Customer receipt</b> <i>Online transaction receipt</i>	A+T	769	<a href="#">delete</a>   <a href="#">edit</a>   <a href="#">copy</a>
<b>Customer Receipt HTML</b> <i>Online Transaction Receipt</i>	A+T+S	6518	<a href="#">delete</a>   <a href="#">edit</a>   <a href="#">copy</a>

The 'Customer Receipt HTML' row is highlighted with a red box, and a red arrow points from the 'Email Editor' menu item to this row.

# Email Editor

## The Mail Template Simplified

**Edit mail template**

**Mail template parameters**

Mail ID: 120274197121

**Title**  
Name of the email that will show up on the Email Editor page, only you will see this

Title: Customer Receipt

**Data sources**  
Data sources from which the Email Editor can pull information from (See slide 16 for more details on this)

Data sources: Account + Transaction + Site

**Mail header**

**Subject**  
Subject line of the email that the receiver will see

Subject: Online Transaction Receipt

**Extra headers**  
Here you can include any BCC or CC email addresses

Extra headers: [Empty text area]

**Mail body**  
Here you can edit the provided HTML and text included in the body of the email

```
<html>
<head>
<meta content="text/html; charset=ISO-8859-1"
http-equiv="Content-Type">
</head>
<body bgcolor="#FFFFFF" text="#000000">
<table border="0" cellpadding="20" cellspacing="0" width="100%">
<tbody>
<tr>
<td valign="top">
<table border="0" cellpadding="3" cellspacing="0"
width="100%">
<tbody>
<tr>
<td bgcolor="ecec" valign="top">
<table border="0" cellpadding="40" cellspacing="0"
width="100%">
<tbody>
<tr>
<td bgcolor="#ffff" valign="top">
<table align="center" border="0"
cellpadding="0" cellspacing="0"
width="100%">
<tbody>
<tr>
<td colspan="1" valign="top">
<table border="0" cellpadding="0"
cellspacing="0" width="100%">
<tbody>
<tr>
```

**Apply**  
Always be sure to hit 'Apply' after making changes to the template, or they will not save

Apply Refresh Preview

(Note: Don't forget to Apply)

# Email Editor

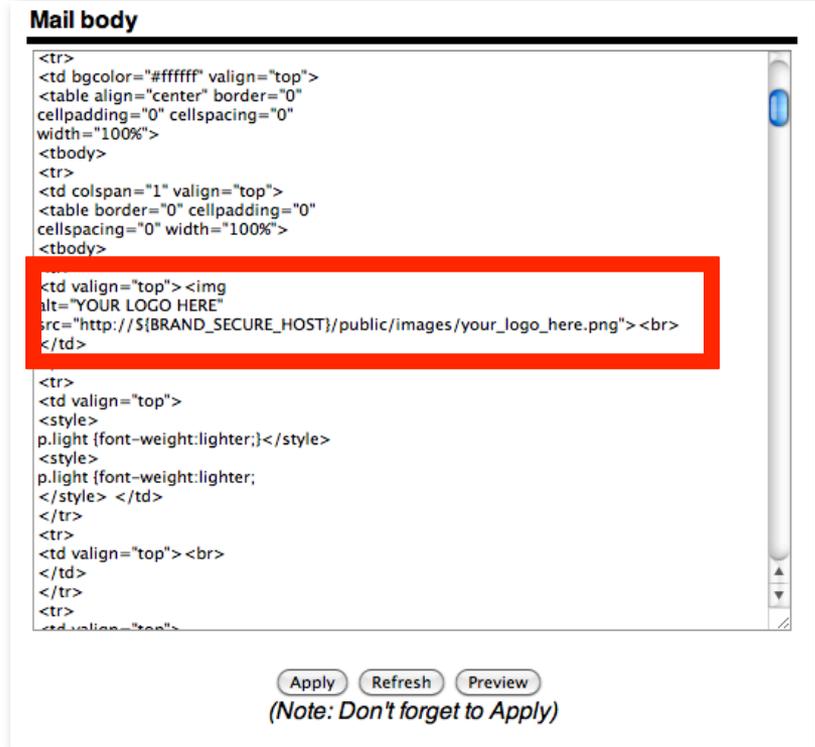
## The Mail Template Simplified & How to Insert Your Logo into HTML Mail Body

After you have made any necessary changes to the title, subject, and extra headers that you want, go ahead and click “Apply”. As far as the Data Sources are concerned, if you are using our provided templates you will not have to worry about these; for more information on them please refer to slide 16.

Now, we are going to place our company logo into the mail body. Find the area highlighted below in the mail body and replace YOUR LOGO HERE with your company name, be sure to keep the quotation marks around the text.

Next, you will take your company logo URL and replace the `http://${BRAND_SECURE_HOST}/public/images/your_logo_here.png`. Be sure to keep the quotation marks around your URL.

Be sure to click ‘Apply’ after you are done making your changes or they will not be saved.



**Mail body**

```
<tr>
<td bgcolor="#ffffff" valign="top">
<table align="center" border="0"
cellpadding="0" cellspacing="0"
width="100%">
<tbody>
<tr>
<td colspan="1" valign="top">
<table border="0" cellpadding="0"
cellspacing="0" width="100%">
<tbody>
<td valign="top">  <br>
</td>
<tr>
<td valign="top">
<style>
p.light {font-weight:lighter;}</style>
<style>
p.light {font-weight:lighter;
</style> </td>
</tr>
<tr>
<td valign="top"> <br>
</td>
</tr>
<tr>
<td valign="top">
```

Apply Refresh Preview  
*(Note: Don't forget to Apply)*

# Email Editor

## Preview the Email Template

You can preview what the template will actually look like by clicking the “Preview” button just below the mail body. The preview will open in the same window. If you want to go back and make any editing changes, just click the back button in your web browser. Once again, if you do make any changes to the content in the mail body, be sure to click “Apply”, or your changes will not be saved.

**Mail body**

```
<tr>
<td bgcolor="#ffffff" valign="top">
<table align="center" border="0"
cellpadding="0" cellspacing="0"
width="100%">
<tbody>
<tr>
<td colspan="1" valign="top">
<table border="0" cellpadding="0"
cellspacing="0" width="100%">
<tbody>
<tr>
<td valign="top">  <
</td>
</tr>
<tr>
<td valign="top">
<style>
p.light {font-weight:lighter;}</style>
<style>
p.light {font-weight:lighter;}
</style> </td>
</tr>
<tr>
<td valign="top"> <br>
</td>
</tr>
<tr>
<td colspan="1" valign="top">
</tr>
</tbody>
</table>
</td>
</tr>
</tbody>
</table>
```

Apply Refresh **Preview**

*(Note: Don't forget to Apply)*

**YOUR LOGO HERE**

Customer Receipt

Hi John,

Thanks for shopping with Chicago Electrical Supply! Please find below your order confirmation, this email is your proof of order and can be printed.

---

Transaction ID:

12053778961

---

Item(s) or Service(s) Purchased:

TEST

---

Customer Information:	Billing Information:
Name: John Smith	Type of Card: CARD
Address: 123 Main St.	Card Number: xxxxxxxxxxxx4444
City: Pleasantville	Exp. Date: 12/21
State: IL	Amount: \$3.00
Zip Code: 60606	Trans Date: Mon 2013-Mar-18 16:16:59 GMT
Country: UNITED STATES	Trans Code: TEST APPROVED
Email: john.smith@gmail.com	Trans Type: Sale

Customer IP Address: .

Customer Hostname: .

---

Miscellaneous Information:

TEST

---

Chicago Electrical Supply | [chielectrical.com](http://chielectrical.com) | Phone: 123.456.7890 | Email From: [mike@chielectrical.com](mailto:mike@chielectrical.com)

Introduction:

# SITE TAGS

Assigning Email Templates

# Site Tags

## What are Site Tags?

**Site Tags** allow you to manage and organize multiple websites under one gateway account. You can operate similar websites, locations or businesses under a single merchant account in compliance with card member association rules. In addition to this, **Site Tags** have several other uses. To find out more information, contact your Agent.

For the purpose of assigning emails to each individual site, you will need at least one **Site Tag** set up in order to move forward with assigning the email templates. Additional fees may apply for **more Site Tags**.

Under each individual **Site Tag**, you will assign your desired email template to the appropriate event; allowing the system to send out an email on your behalf when that event occurs. The next few slides will walk you through the basics of **Site Tags**.

## Quick Overview

- Getting Started (Slide 11)
- Emails Site Tool Page Broken Down (Slide 12)
- Event Key (Slide 13)

# Site Tags

## Getting Started

On the navigation menu, follow this path to get to **Site Tags**: Setup > Site Tools > **Site Tags**. From the list, find the **Site Tag** you wish to assign emails to and select “email”.

**NOTE:** If you do not have any **Site Tags** you will need to create at least one here before you can move on to assigning emails, it is mandatory to have at least one **Site Tag**.

The image shows a navigation menu on the left and a management page on the right. A red arrow points from the 'Site Tags' option in the menu to the 'SITE1' entry in the table on the right page.

**Navigation Menu:**

- [-] **Setup**
  - Account Configuration
    - ▶ Manage Users
    - ▶ Access Security
    - ▶ Credit Cards
    - ▶ Check Processing
    - ▶ Contact Information
    - ▶ Preferences
    - ▶ Manage Affiliates
  - Site Tools**
    - ▶ **Site Tags**
    - ▶ Email Editor
    - ▶ Button Editor
    - ▶ Form Editor
  - User Settings**
    - ▶ Change Password
    - ▶ Profile

**Site Tags Management Page:**

Select site to manage, or add new site

Primary site: SITE1 - my site [Apply]

Site tag	Site name	Site URL	Actions
SITE1	my site		<a href="#">config</a>   <a href="#">email</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add site"/>

[Refresh]

# Site Tags

## Emails Page: Broken Down

**Site tag**  
Name of the selected site tag you have chosen

**Email template sent to merchant**  
Here you can set the email address of who you want to receive these notifications at your merchant level and choose from the drop down menus the template you want to be sent for each event (event key on slide 12).

**Email templates sent to customer**  
Here you can set the email address of who the email will be sent from and also add a BCC email address. You can choose from the drop down menus which email template you want your customers to receive for each event (event key on slide 12).

**Apply**  
Always be sure to hit 'Apply' after making changes to the template, or they will not save

View or edit site parameters

Basic information		Actions
Account ID	200252850176	<a href="#">config site</a>
Site ID	200271025476	<a href="#">eventlog</a>
Site tag	SITE1	<a href="#">remove site</a>

[Click here to create templates to use below](#)

Email templates sent to merchant	Template data
<b>To</b> <input type="text"/>	
Standard receipt	<input type="text"/> Acct Trns Site
Decline notice	<input type="text"/> Acct Trns Site
Refund receipt	<input type="text"/> Acct Trns Site
Credit receipt	<input type="text"/> Acct Trns Site
Rebiling receipt	<input type="text"/> Acct Trns Memb Site
Rebiling failure	<input type="text"/> Acct Trns Memb Site
Member resignation	<input type="text"/> Acct Memb Site
Member expiration	<input type="text"/> Acct Memb Site

Email templates sent to customer	Template data
<b>From</b> <input type="text" value="john.smith@abcmerchant.com"/>	
<b>Bcc</b> <input type="text" value="john.smith@abcmerchant.com"/>	
Standard receipt	<input type="text"/> Acct Trns Site
Decline notice	<input type="text"/> Acct Trns Site
Refund receipt	<input type="text"/> Acct Trns Site
Credit receipt	<input type="text"/> Acct Trns Site
Member welcome	<input type="text"/> Acct Trns Memb Site
Rebiling receipt	<input type="text"/> Acct Trns Memb Site
Rebiling failure	<input type="text"/> Acct Trns Memb Site
Member resignation	<input type="text"/> Acct Memb Site
Member expiration	<input type="text"/> Acct Memb Site
Expiration email	Send email <input type="text" value="1 day"/> before membership expiration

**Template data**  
Data sources allowed for each given template and event (See slide 12 for more details on this)

**Membership expiration notice**  
Set how many days in advance of a membership expiring you want your customer to receive notification of this.

# Site Tags

## Emails Page: Event Key

Below is a description of each event you can assign an email template to. Once you have gone through and assigned your emails, be sure to click 'Apply' at the bottom of the page, or your changes will not be saved.

## Email Templates Sent to Merchant & Customer

Event	Description
<b>Standard Receipt</b>	Sent every time a successful transaction is completed
<b>Decline Notice</b>	Sent every time a declined transaction is incurred
<b>Rebilling Receipt</b>	Sent every time a successful rebilling transaction is completed
<b>Rebilling Failure</b>	Sent every time a failed rebilling transaction is incurred
<b>Member Welcome</b>	Sent every time a new member is added to your website
<b>Member Resignation</b>	Sent every time a member from your site uses the member cancellation page to resign their subscription

Introduction:

# FIELD NAMES & DATA SOURCES

Advanced Features Definitions & Explanations

# Field Names & Data Sources Defined

## Field Names & Data Sources

Each email includes **Field Names** that act as a place holder for where you want a piece of customized data to appear in the email. Every time an email goes out, the system pulls information directly from the database and auto populates the **Field Name** in the mail body with the customized information.

There are four **Field Name** categories, otherwise known as **Data Sources**, which are required for each email template and help determine what kind of information will need to be pulled from the database for a given email.

There are four **Data Sources** from which the Email Editor can pull information from, but not all data sources are available for every email. The four data sources are **Account**, **Transaction**, **Site** and **Subscription/Membership**.

## Quick Overview

- The Four Data Sources Defined (Slide 16)
- Data Sources (Slide 17)
- Field Name (Slide 18)

# Data Sources Defined

## Account

**This information is available to every email.** These fields are specific to your account and pull from information that you entered during your account setup (i.e. company name, address, email addresses and telephone numbers). These fields are static and are always available to use in the **Email Editor**. Although you could just manually type in your contact information in your email template, this ensures that if any contact information ever changes, it will automatically be updated in your emails as well.

## Transaction

**This information is only available in emails that are a result of a transaction,** such as a transaction receipt or a subscription signup. These fields are specific to an individual transaction (i.e. credit card number, the card holder's first and last name, and billing address). This information is specific to a single transaction and once the transaction is complete, the information is no longer available to the email manager.

## Site

**This information is only available to emails that are associated with a SITE.** These fields are specific to your website (i.e. site tag, name of the website, the webmaster's email or site URL). This information is static and is always available to the email manager. Most transactions can use this information - but in certain places (such as the Virtual Terminal) you can choose to omit the SITE. If the SITE is omitted, this information will not be available in the **Email Editor**.

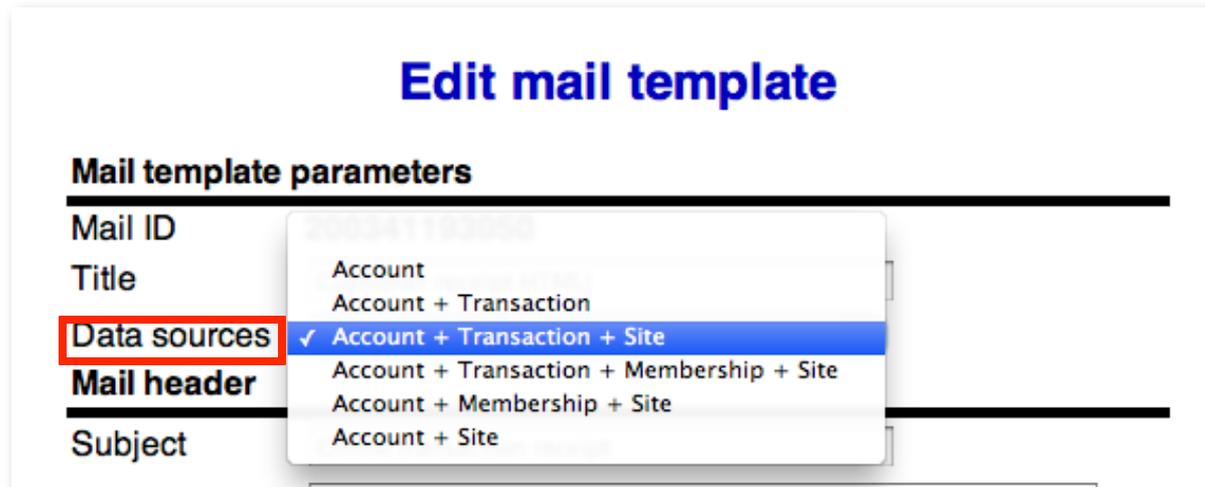
## Subscription/Membership

**This information is only available to emails that are associated with a Subscription or Membership.** These fields are specific to a membership, but not a part of the transaction data (i.e. username, password, length of membership, and expiration date). This information is specific to a single membership signup, and is no longer available to the email manager after the signup is complete.

# Data Sources Defined

## Data Sources

On the top of the mail template, you will see one of the drop down boxes lets you choose the **Data Sources** for the email. If you are using a email template we have provided, there is no need to change these; they already correspond with the email template appropriately.



The screenshot displays the 'Edit mail template' interface. The title 'Edit mail template' is centered at the top in blue. Below it, the section 'Mail template parameters' is underlined. The form contains several fields: 'Mail ID' (with a value of 200341193050), 'Title', 'Data sources' (highlighted with a red box), 'Mail header' (underlined), and 'Subject'. A dropdown menu is open for the 'Data sources' field, showing a list of options: 'Account', 'Account + Transaction', 'Account + Transaction + Site' (selected with a blue bar and a checkmark), 'Account + Transaction + Membership + Site', 'Account + Membership + Site', and 'Account + Site'.

Mail template parameters	
Mail ID	200341193050
Title	
<b>Data sources</b>	Account Account + Transaction ✓ Account + Transaction + Site Account + Transaction + Membership + Site Account + Membership + Site Account + Site
Mail header	
Subject	

# Field Names Defined

## Field Names

Just below the mail body in the mail template you will see the **Field Name** help. Here you can scroll through the different **Field Names**. Simply click in your mail body where you want to place a **Field Name**, then click your desired **Field Name** and it will automatically be placed where your cursor is.

### Field name help

*Click on the field name to automatically insert it at your cursor's position.*

#### Account data source fields

<code>\${ACCOUNT_ID}</code>	The ID number of the merchant (ex. 123456789012)
<code>\${AGENT_COMPANY_NAME}</code>	The name of the merchant's agent (ex. 3rd National Bank)
<code>\${AGENT_ID}</code>	The ID number of the merchant's agent (ex. 234567890123)
<code>\${AGENT_PUBLIC_EMAIL}</code>	The email address of the merchant's agent
<code>\${AGENT_PUBLIC_PHONE}</code>	The phone number of the merchant's agent
<code>\${BRAND_COMPANY}</code>	The company name of the payment processor
<code>\${BRAND_DOMAIN}</code>	The website for the payment processor
<code>\${BRAND_PRODUCT}</code>	The name of the payment product
<code>\${BRAND_SECURE_HOST}</code>	The secure website for the payment processor
<code>\${COMPANY_CITY}</code>	The merchant's city (ex. Eightville)
<code>\${COMPANY_COUNTRY}</code>	The merchant's country (ex. USA)
<code>\${COMPANY_DBA_NAME}</code>	The doing-business-as name of the merchant's company (ex. John's BBQ Sauce)
<code>\${COMPANY_FAX}</code>	The merchant's fax number (ex. 888-888-8889)