Feature Overview & Tutorial

EMAIL EDITOR & SITE TAGS

Create & Assign HTML Email Templates

NETbilling

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

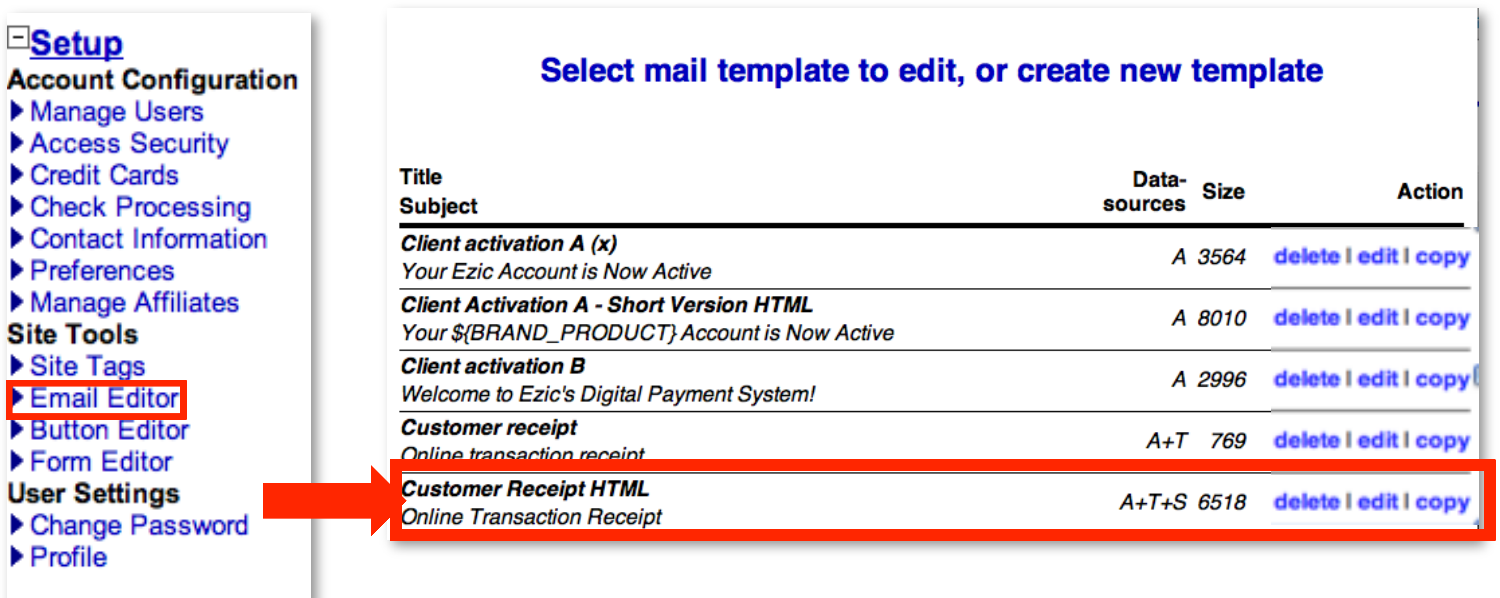
- How to get to the Email Editor (Slide 5)
- Getting Started for New Users (Slide 5)
- Editing a Template (Slide 5)
- The Mail Template Simplified (Slide 6 & 7)
- How to Insert Your Logo into HTML Mail Body (Slide 7)
- Preview the Email Template (Slide 8)

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.



Email Editor

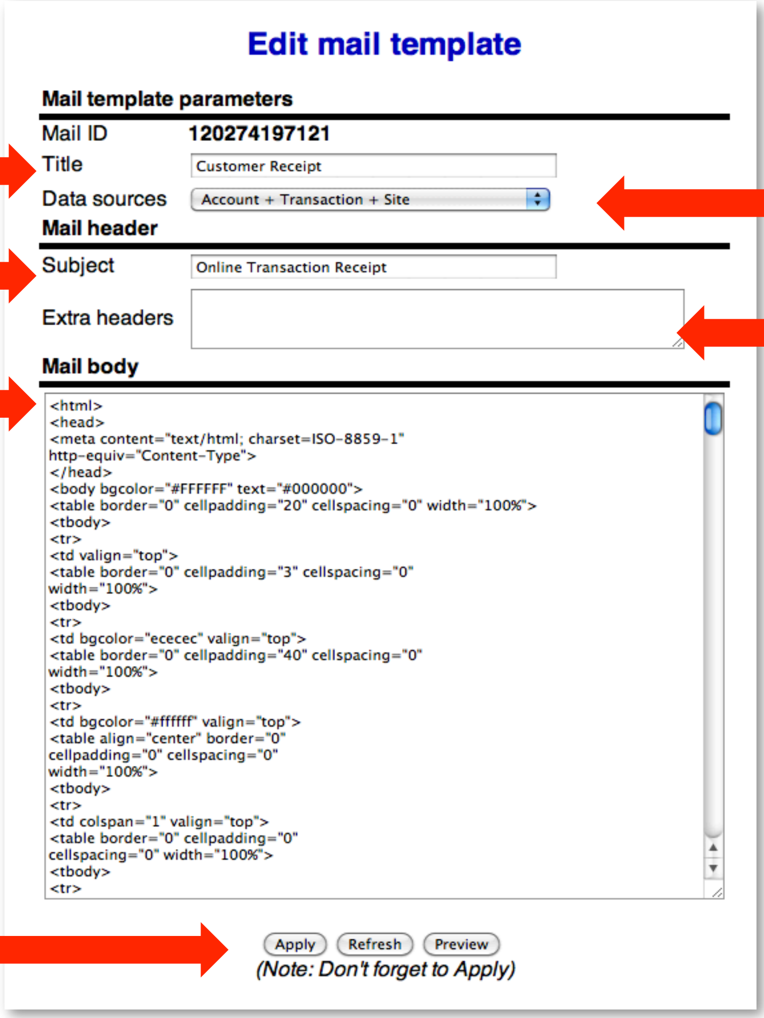
The Mail Template Simplified

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

Subject
Subject line of the email that the receiver will see

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

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



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

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

Email Editor

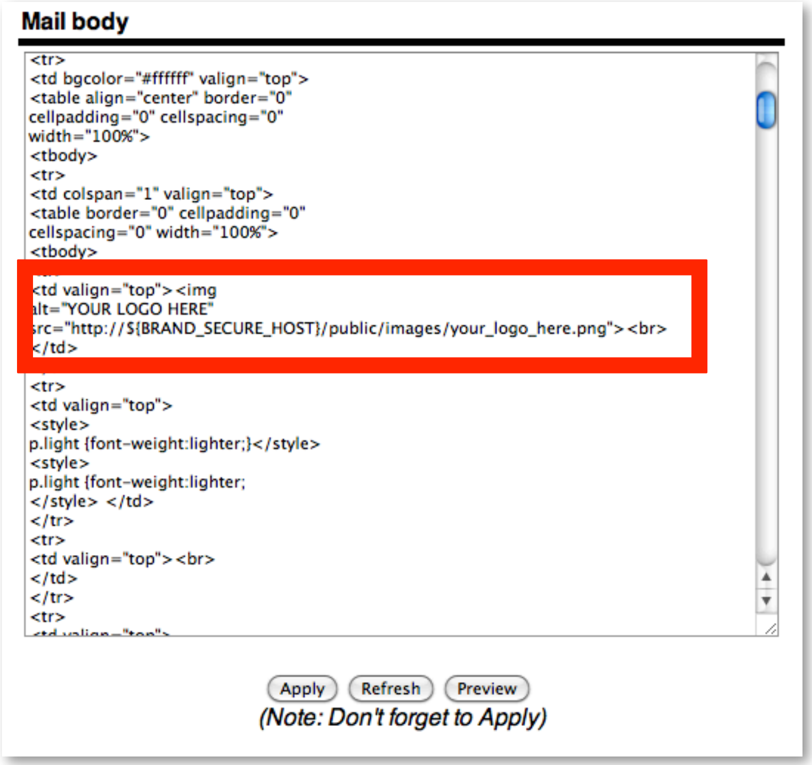
The Mail Template Simplified & How to Insert Your Logo into HTML Mail Body

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.

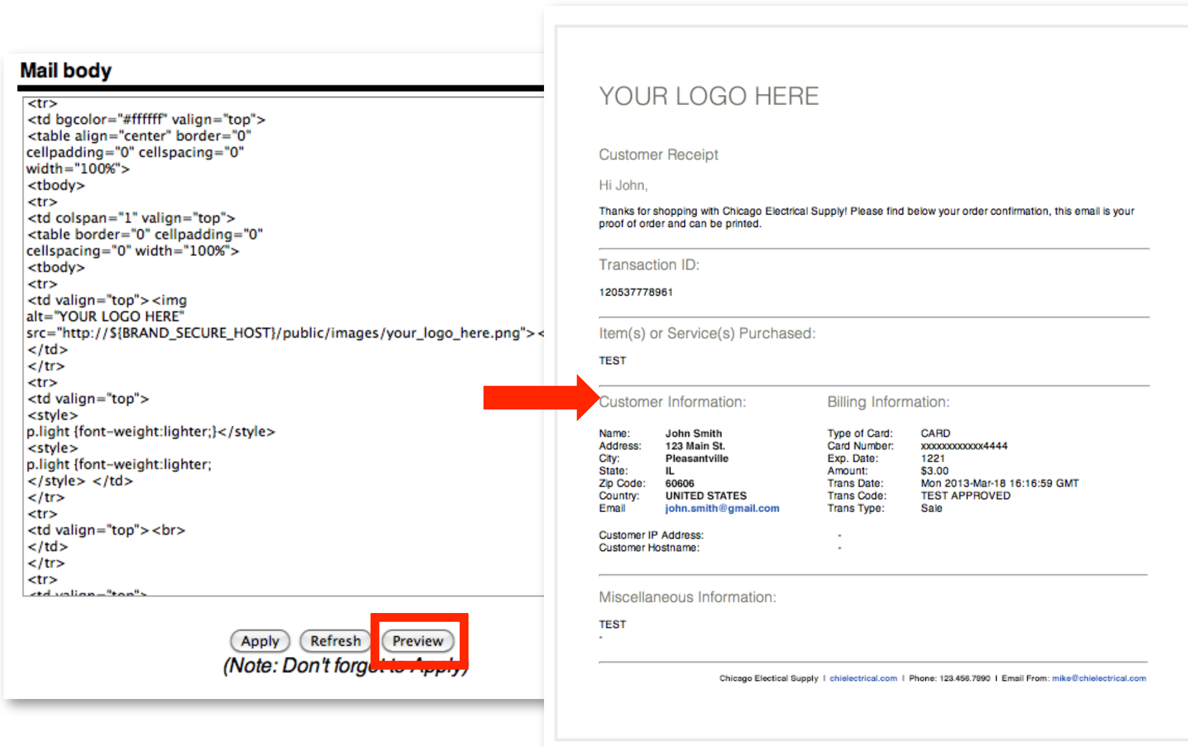
Be sure to click ‘Apply’ after you are done making your changes or they will not be saved.



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.



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 an 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

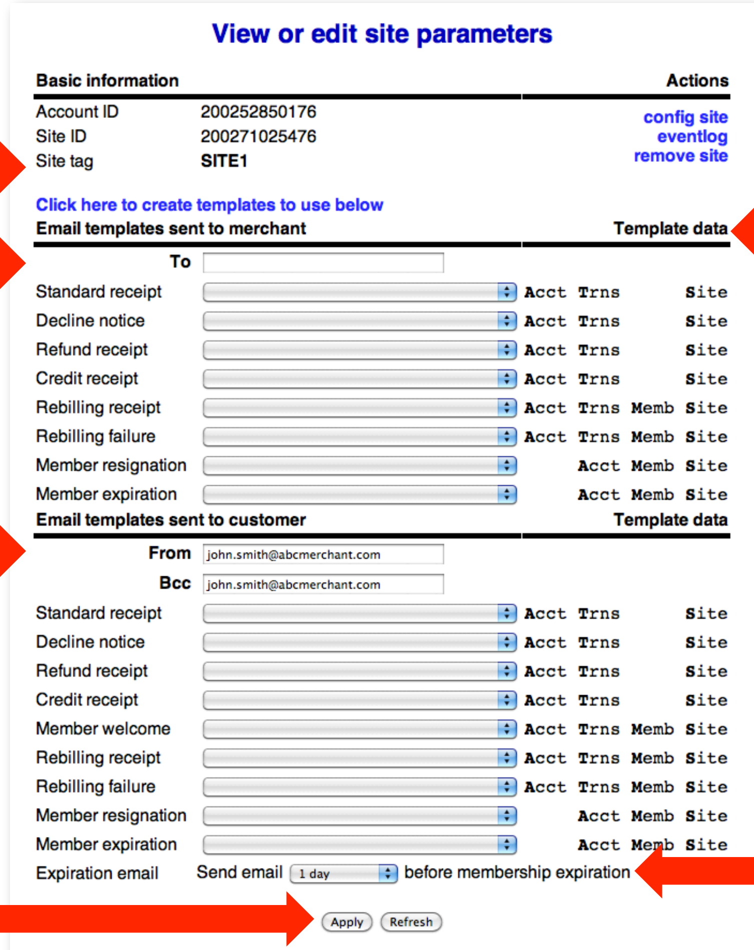
Getting Started

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**.

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

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
Standard Receipt	Sent every time a successful transaction is completed
Decline Notice	Sent every time a declined transaction is incurred
Rebilling Receipt	Sent every time a successful rebilling transaction is completed
Rebilling Failure	Sent every time a failed rebilling transaction is incurred
Member Welcome	Sent every time a new member is added to your website
Member Resignation	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**.

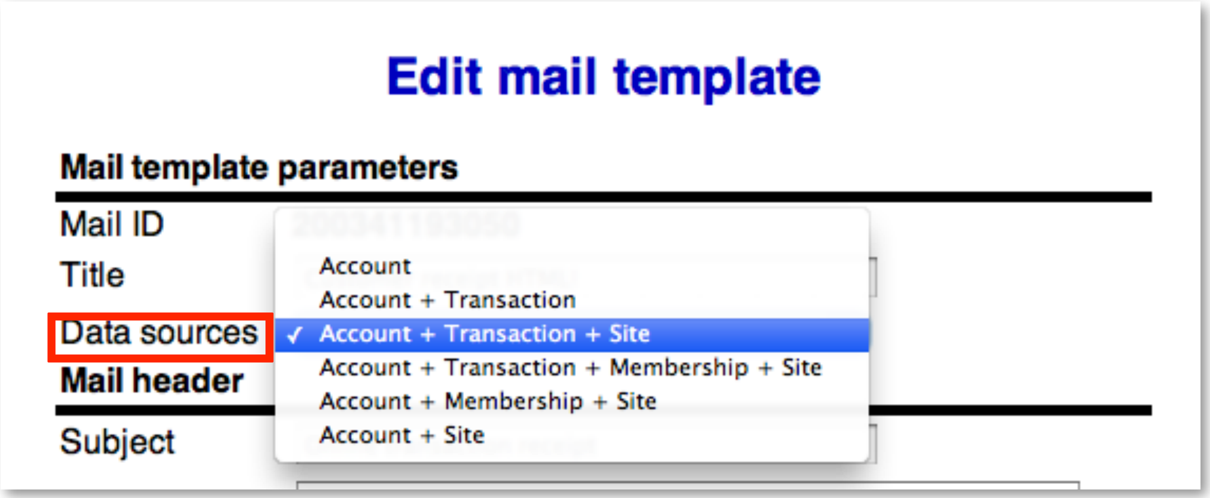
Subscription/Membership

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.



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 you cursor is.

Field name help

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

Account data source fields

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