Create and Edit Email Templates

All notifications are initially set up to use a Default Email Template. You can either edit the default template which is associated with the notification or as an alternative, you can create a new email template and associate that email template with the notification.

Access the Email Templates

To access the email templates:

1. Click your user name at the top right-hand side of the application.
3. Click Setup Profiles, Notifications and Email Templates.
4. Click the Email Templates tab.

Complete the Basic Template Information

To create a new email template or modify an existing one:

1. On the Email Templates page, click add new email template to create a new template, or click a template name in the list to edit an existing template.
2. In the Basic Information Section, enter the following information about the template:
   ◦ Name. Specifies the template name. The name displays in the Email Templates list in Zuora.
   ◦ Active. Specifies whether the template is active. You can only add active templates to notifications.
   ◦ Related Event. Specifies the trigger that the template is used for.

   If your tenant has the Notification and the Configurable Event features enabled, you can create email templates for predefined events and events that you have configured via the Notification and Event Services API.

   The Configurable Event feature is in Limited Availability. If you wish to have access to the feature, submit a request at Zuora Global Support.

   ◦ Description. Optionally, describes the purpose of the email template.

3. In the Email Information Section, enter the following information to configure the email settings:
   ◦ From Name. Specifies the name that appears in the From field in the notification message.
- **From Email.** Specifies the email address that appears in the From field in the notification message. Select Tenant Email to use the email address configured in your tenant profile, or select A Specific Email and enter an email address.

- **To Email.** Specifies the email address that receives the notification message. The options depend on the Related Event that you selected. Typically, you can select Bill To Contact, Sold To Contact, Both Bill and Sold To Contacts, or All Customer Contacts from the list. You can also select Specific Email(s) and then enter an email address. For some related events (for example, Create New Subscription), you can select options that send the notification to contacts of the invoice owner rather than the subscription owner.

  Whichever option you select from the To Email list, event notifications are sent only to work email addresses or only to personal email addresses.

  - If a contact has only work email addresses, the work email addresses are used.
  - If a contact has no work email addresses but has personal email addresses, the personal email addresses are used.
  - If a contact has both work and personal email addresses, only the work email addresses are used.

- **Reply-to Email.** Specifies the email address that appears in the Reply-to field in the notification message. Select Tenant Email to use the email address configured in your tenant profile, or select A Specific Email and enter an email address. Zuora notification system will send any undeliverable emails to the Reply-to Email address.

- **CC Email.** Specifies email addresses to be included in the CC (carbon copy) list of recipients.

- **BCC Email.** Specifies email addresses to be included in the BCC (blind carbon copy) list of recipients.

To specify several email addresses for From Email, To Email, Reply-to Email, CC Email, or BCC Email fields, select Specific Email(s) from the drop-down list on any of these fields. Enter the comma-separated email addresses.

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**Complete the Body of the Email Template**

**To complete the template content:**

1. Select the format mode you want to use in the Format field: HTML or Plain Text.

If you switch from HTML to plain text after you format a template, all HTML formatting is lost.

2. Complete the Subject field and enter the text in the Email Body text box.

3. (Optional) Create and insert merge field tags into the template.

   Use this option to merge account-specific or subscription-specific information into the email.

   To insert merge field tags:
   a. In the Available Merge Fields section, make selections in the Select Type Field and the Select Fields lists. The merge field tag appears in the Merge Field Tag field.
   b. Copy and paste the merge field tag into the appropriate place in the subject or body of the template.

4. Click Preview to see your email template as it will appear to recipients.
To email the preview, enter an email address in the **Send Preview Email To** field and click **send preview**.

5. Click **save** when you are done.

If you are using the default email templates, view the template and verify the addresses in the Email Information section to confirm that valid email addresses are set in the From Email and Reply-to Email fields.

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**Format an HTML Email**

The following options are available in HTML format mode:

- **Standard HTML formatting options**: Font type, font size, font color, bold, and italics, numbered and bulleted lists, and so on.
- **Links**: You can insert a hyperlink to any URL into the text of your email template. The hyperlink can even include merge field tags if you want to provide a custom URL for each recipient (for example, if the URL is linked to a personalized portal page for each recipient).
  - To insert a link, click the ![Link Icon](https://example.com) and complete the information on the **Link Info** tab. For example:

  ![Link Info Tab](https://example.com)

  - To select the target window that will present the link information, click the **Target** tab and complete the information.

- **Images**: You can include images such as company logos. Host any images you want to include in your template on an external server.
  - To insert an image, click the ![Image Icon](https://example.com) and complete the information in the **Image Info** tab to size and place the image in the template. The unit of measure for the **Image Info** fields is pixels.
    - To make the image a clickable link, click the **Link** tab and enter the target URL and the target window.

- **Source**: Click **Source** to see the HTML source code if you need to do more complex tasks such as inline CSS editing or embedding anchor tags. When you are done, click **Source** again to return to HTML mode.

Standard HTML tags are generally supported. For security reasons, the following HTML tags and JavaScript events are not permitted. To test whether a specific tag is supported in an email template, click **Preview** to see the template as it appears to recipients.

- Restricted HTML tags: script, form, input, button, and svg.
- Restricted Javascript events: All on events. For example, onclick, onload, onchange, onfocus, onselect, and so on.
If you add merge fields, e.g., `<DataSource.BillToContact.FirstName>`, directly in the HTML Source mode, the merge field will be deleted when you save the file. Add merge fields only in the HTML mode and plain text mode.

https://knowledgecenter.zuora.com/CF_Users_and_Administrators/Notifications/Create_Email_Templates

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