

Transactional Emails

Engage your customers further with
custom transactional emails

Transaction Emails

Create and customize your transactional emails, add images, business logo, and include customer balance and/or list of rewards available.

Email templates can be customized and associated to all or specific campaigns. Each program campaign can have multiple email templates associated but they are limited to one per each email transaction type.

Transactional email types



NEW CUSTOMERS

Send a welcome email to customers enrolling in the loyalty program.



ACCRUALS (POSITIVE TRANSACTIONS)

Send an email to customer earning points, visits, purchasing Gift Cards, and promotional items (if Buy X Get 1 Free Program).



REDEMPTIONS (DEDUCTIONS)

Use this email to congratulate customers for redeeming rewards or gift card value.

Notes:

- When you create and associate an email template to a campaign using this new module in the Client-Toolbox you are replacing the current built-in email template functionality.
- This feature requires the SMTP Email Configuration in order to work.

Setup - Client Toolbox

1 Click show for Manage Email Templates

Demo Account Hello, Edgar Arana Jump to: Account Control Panel Go

Account Information Edit

Business Name: Demo Account Account Owner: Edgar Arana
Address: 4527 N Lamar Blvd Owner Contact: edgar.arana@fintivtech.om
Austin, TX 78751 202-441-9862
US

Customers: 79 Manage Customer Records
Manage Custom Fields

Campaigns Manage Campaign Triggers

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
Gift Card	19	57	Add Lookup	Deactivate	Edit
Points Program	52	178	Add Lookup	Deactivate	Edit

Add a New Campaign View On-Hold Campaigns

Campaign Reports Show

Manage Authorized Users and their permissions Show

Manage Email Templates Hide

Template ID	Template Name	Campaign	Rule
17	Reward Email - Redemption	Points Program	Redemptions
16	Transactional Email - Points Earned	Points Program	Accruals
15	Welcome Email - Points Program	Points Program	New Customers

Create New Email Template

2 Name your template, choose the type of transactional email, and associate it to a single or multiple campaigns.

Edit Email Template: 15

Template ID: 15

Template Name: Welcome Email - Points Program

Template Description: Welcome email to customers enrolling in (optional)

Rule

Send customers this email when: Accrue Only (Positive Transactions) Redemption (Deductions) Customer New

Campaign: Points Program

Template Name: Welcome Email - Points Program

Template Description: Welcome email to customers enrolling in (optional)

Rule

Send customers this email when: All Earn money per event Points Program Gift Card Event Based Program Buy X Get 1 Free Program

Email Content

3 Add email content and save

Email Subject: Welcome to Demo Rewards!

Email Content

Merge Fields (Click to copy to clipboard)

#card_number# => Customer card number	#email# => Customer email
#first_name# => Customer first name	#last_name# => Customer last name
#phone# => Customer phone number	#date# => Customer date of birth

Balance Fields (Only applies to transactions)

Include balance: Yes Include rewards available: Yes

Source

Styles Format Font Size

WELCOME!

Earn 1 point for every dollar spent at any of our locations!

Check your balance, rewards, and redeem [HERE](#)

Send Email Test:

Update or Cancel

Image Properties

Image Info Link Advanced

URL: https://earana.com/demo/emailimages/welcomeimage.jpg

Alternative Text:

Width: 100% Height: Border: HSpace: VSpace: Alignment: <not set>

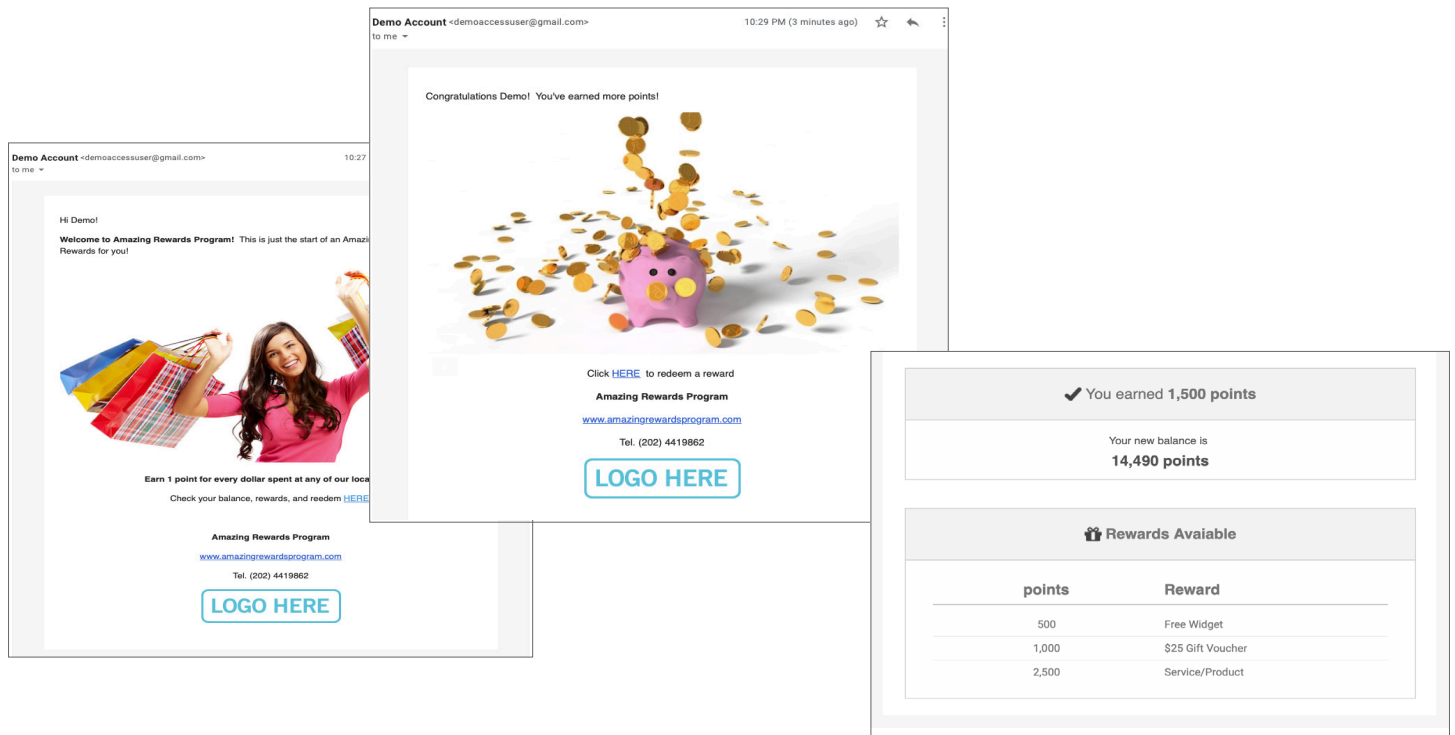
Preview: **WELCOME!**

Cancel OK

Note: If you are adding images enter your image URL and set width to 100%.

Some Examples

Customize all transactional emails for each campaign to engage customers even more.



Include in your email:

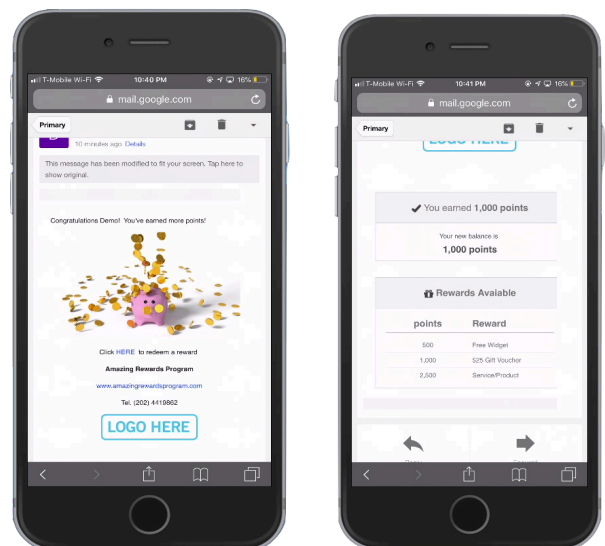
- ✓ Customer New Balance
- ✓ List of Rewards Available
- ✓ Customer Fields

Merge Fields (Click to copy to clipboard)

#card_number# => Customer card number	#email# => Customer email
#first_name# => Customer first name	#last_name# => Customer last name
#phone# => Customer phone number	#date# => Customer date of birth

Balance Fields (Only applies to transactions)

Include balance: ☒ Yes Include rewards available: ☒ Yes



When recording transactions...

Client Toolbox

New Customers

Customer ID (optional): 164862595270063 or Generate Random Number
A unique Card # or Customer Account ID is necessary for them to be able to check their balances on your site.

First Name: Demo
Last Name: Customer
Password:
Phone Number: 1648625955
Email Address: demoaccessuser@gmail.com
Birthday:
Address:
City:
Family Members: ☒ 1 ☐ 2 ☐ 3 ☐ 4+
Favorite Brand: ☒ Coca Cola ☐ Pepsi ☐ Other
Other campaign to add customer to: ☐ Gift Card ☐ On Hold: Buy X Get 1 Free Program ☐ On Hold: Earn money per event ☐ On Hold: Event Based Program
Send welcome email: ☒ Yes

Create Customer Account

Accruals

Redemptions

Points Program

Lookup a Customer Add a Customer

Customer Account

Current Balance: 1,000 Points

Print Summary

Customer ID: 164862595270063

Name: Demo Customer

Phone Number: 1648625955

Email Address: demoaccessuser@gmail.com

Family Members: 1

Favorite Brand: Coca Cola

New Activity

Rewards Available

Enter Purchases Total: \$

Select a Promotion: None

Description:

Payment Method: Select:

Send Email? ☐ Yes

Deduct Points or Dollars:

Points \$ (Available: \$50.00)

Or select a reward to redeem:

Points Description of Reward

500 - Free Widget

1,000 - \$25 Gift Voucher

2,500 - Service/Product

Description (optional): 978659

Send Email? ☒ Yes

Deduct

Account Activity

Print

Trans. ID	Date	Activity	Points	(Amount)	Recorded By:	Description
1189	2019-01-30	Earned: 1,000 points	\$1,000.00	demo_so		
1187	2019-01-30			demo_so		Account Activated.

Done

API

New Customers

Accruals

Redemptions

POST Record \$ Transaction - Purchase

Record \$ Transaction - Purchase through POS

POST

Params Authorization Headers Body Pre-request Script Tests

none form-data x-www-form-urlencoded raw binary

KEY	VALUE
account_id	{{account_id}}
user_id	{{user_id}}
user_password	{{user_password}}
campaign_id	{{campaign_id_points}}
type	record_activity
code	003
amount	950
authorization	RV001004
send_transaction_email	Y

POST Redeem by Reward ID

Redeem by Reward ID

POST

Params Authorization Headers Body Pre-request Script Tests

none form-data x-www-form-urlencoded raw binary

KEY	VALUE
account_id	{{account_id}}
user_id	{{user_id}}
user_password	{{user_password}}
campaign_id	{{campaign_id_points}}
type	redeem
code	003
reward_to_redeem	67891
authorization	Gift Voucher 0987986576
send_transaction_email	Y

POST Register New Customer

POST

Params Authorization Headers Body Pre-request Script Tests

none form-data x-www-form-urlencoded raw binary

KEY	VALUE
account_id	{{account_id}}
user_id	{{user_id}}
user_password	{{user_password}}
campaign_id	{{campaign_id_points}}
type	record_customer
customer_action	new
card_number	003
code	003
customer_password	003
first_name	Edgar
last_name	Arana
phone	003
email	demoaccessuser@gmail.com
auto_add	150
authorization	Bonus Sign up Points
send_transaction_email	Y

API

These are the API calls available to manage Email Templates:

EMAIL TEMPLATES

Email Template - New	✓
Email Template - Update	✓
Email Template - Information	✓
Email Template - List	✓
Email Template - Delete	✓
Fixed Trigger - Update	✓

API DOCUMENTATION

Last Update: Nov, 2018

Premiere Access
[Enterprise-Level API Calls](#)

API Calls
[Overview](#)

Clients (Businesses)
[Account - Update](#)
[Account - Info](#)
[Dashboard - Info](#)

Custom Fields
[Customer Field - Create](#)
[Customer Fields - List](#)
[Customer Field - Update](#)
[Customer Field - Delete](#)
[Transaction Field - Create](#)
[Transaction Fields - List](#)
[Transaction Field - Update](#)
[Transaction Field - Delete](#)

Clients (Businesses)
[User - New](#)
[User - Update](#)
[Users - List](#)
[User - Info](#)
[User - Delete](#)
[Users - Add to Campaign](#)
[Users - Rem. from Campaign](#)

Email Templates - Create New

Allows you to add a new email template to an existing loyalty account. Email templates allow you to send customers a different email based on the following activity types: 1. Positive transactions, 2. Redemptions, 3. New account creation (enrollment/registration).

The data to be submitted to the API is composed of the following fields:

Fields common to all campaign types:

field	Example	Note
API	1.5	Required
user_id	john1970	Required
user_api_key	1959caadac9b13dcb3	Required
type	manage_email_templates	Required
action	new	Required
account_id	greatwidgets	Required
template_name	Welcome Email	Required
template_description	This is the email that new customers will receive when enrolling in the loyalty program	Optional
template_rule	record, redeem, or new_accounts	Required
campaign_id	all or campaign id(s)	Required
template_subject	Welcome to Amazing Rewards	Required
template_content	[HTML Content]	Required
include_balance	Y	Optional
include_rewards	Y	Optional

http://api.clienttoolbox.com/email_templates.html