

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 temples 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

The screenshot shows the 'Demo Account' dashboard. In the center, there's a section titled 'Manage Email Templates' with a table listing three templates:

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

Below the table is a button labeled 'Create New Email Template'.

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

The dialog box shows the following fields:

- Template ID:** 15
- Template Name:** Welcome Email - Points Program
- Template Description:** Welcome email to customers enrolling in (optional)
- Rule:** Accrue Only (Positive Transactions)
Redemption (Deductions)
Send customers this email when:
 Customer New
- Campaign:** Points Program
- Template Description:** Welcome email to customers enrolling in (optional)
- Rule:** Send customers this email when:
Campaign:
 All
 Earn money per event
 Points Program
 Gift Card
 Event Based Program
 Buy X Get 1 Free Program
- Email Content:** A dropdown menu showing 'Welcome Email - Points Program'.

- 3 Add email content and save

The editor has the following sections:

- Email Subject:** Welcome to Demo Rewards!
- Email Content:**
 - Merge Fields:** #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. Includes 'Include balance:' and 'Include rewards available:' checkboxes.
 - Text Editor:** Includes a rich text toolbar and preview area showing the word 'WELCOME!' in large, colorful letters.
 - Text at the bottom:** Earn 1 point for every dollar spent at any of our locations! Check your balance, rewards, and redeem [HERE](#).
- Send Email Test:** A text input field.
- Buttons:** Update or Cancel.

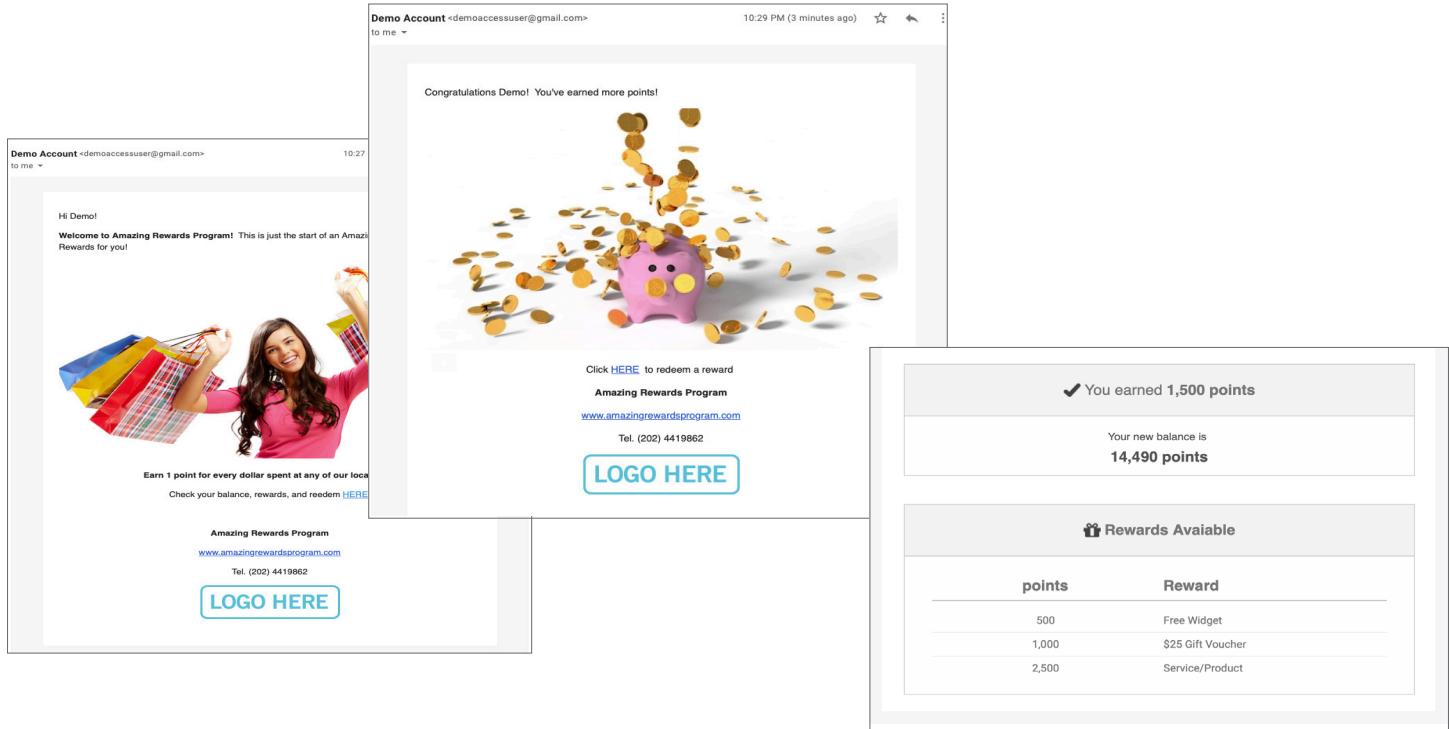
The dialog box shows the following settings for an image:

- URL:** https://earana.com/demo/emailimages/welcomeimage.jpg
- Alternative Text:** An empty text input field.
- Width:** 100%
- Height:** An empty text input field.
- Border:** An empty text input field.
- HSpace:** An empty text input field.
- VSpace:** An empty text input field.
- Alignment:** <not set>
- Preview:** A small image preview showing the word 'WELCOME!' with colorful confetti.
- Buttons:** Cancel or 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.



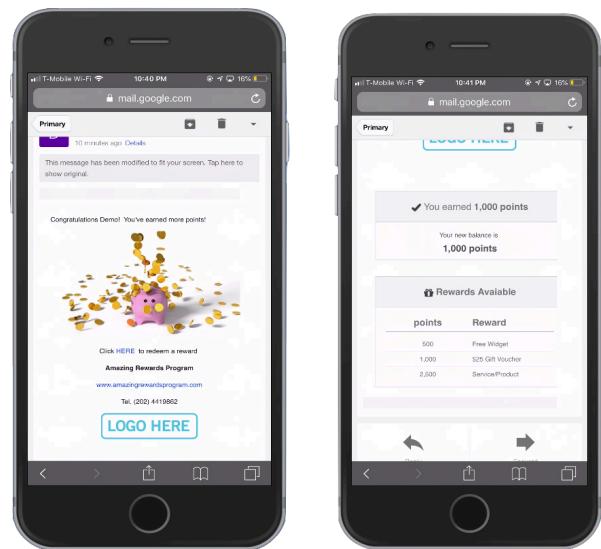
Include in your email:

- ✓ 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

Accruals

Redemptions

API

New Customers

Accruals

Redemptions

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

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