Zoho Corporation

Email Template

Manage your communications swiftly using easy-to-create, reusable templates that will help you automate sending repetitive emails to multiple recipients. Email templates will be used in conjunction with email notifications.

> ⓘ - **Permission Required**: Email Template
> - Find out the Edition-specific limits for Email Template.

Create Email Templates

To create an email template:

1. Navigate to **Setup** > **Email** > **Email Template** and click **Create New**.
2. Enter the following details, then click **Next**:
   a. A **Template Name**
   b. **Choose Module**: The module for which you want to create the email template
   c. A **Description** of the email template

Add New Template

Template Name	New Request
Choose Module	Contacts ▾
Description	Notify the contact when a new request is created for them

Cancel   Next

3. In the **Template Builder**, add the body of the email and click **Save & Preview**.

Add New Template ✕

Module Name	Requests
Template Name *	New Request
Description	Notify the contact when a new request is created for them

B *I* U S | x₂ x² | A A | ≡ ≡ ≡ ≡ | ≡ ≡ | ≡▾ ≡▾ | ≡ | ↺ ↻ | ❝▾ | ⊞ | ⋯

Dear ${Requests.Contact.Salutation} ${Requests.Contact.First Name} ${Requests.Contact.Last Name},

A new request ${Requests.Request Name} has been created for you. Please find the details below:

Request Attribute	Request Value
Summary	${Requests.Summary}
Priority	${Requests.Priority}
Due Date	${Requests.Due Date}

For further information, please contact us at support@zohofsm.com.

Thanks,
${Organization.Organization Name} Team

+ Add Placeholders Or Type "#" to add the Placeholder   🔗 Attach

Cancel   **Save & Preview**

To add a placeholder, type #. From the dropdown, select a module whose field value you want to use. Search the field you want to use and select it. The placeholders will get replaced with actual values when the email is sent.

Edit Template   ✕

Module Name	Requests
Template Name *	New Request
Description	Notify the contact when a new request is created for them

Toolbar: B I U S | X₂ x² | A A | ≡ ≡ ≡ ≡ | ≡ ≡ | ≡▾ ≡▾ | ≡ | � ↶ ↷ | ❝▾ | ⊞ …

Dear ${Requests.Contact.Salutation} ${Requests.Contact.First Name} # ,

A new request ${Requests.Request Name} has b[...]ow:

Contact (Contacts)	⌄
🔍 L	

Email

Last Name

Mobile

Salutation

ZBilling Id

Request Attribute	
Summary	
Priority	
Due Date	

For further information, please contact us at sup[...]

Thanks,
${Organization.Organization Name} Team

＋ Add Placeholders Or Type "#" to add the Placeholder   📎 Attach

Cancel   **Save & Preview**

Using the options available in the toolbar you can format the content in the body of the email. You can also use the **HTML Editor** [</>] to make any modifications. The first row in a table cannot be deleted as it is meant for adding the table headings. You can include an attachment in your email.

Add New Template   ✕

Module Name	Requests
Template Name *	New Request
Description	Notify the contact when a new request is created for them

B   I   U   S | X₂   x² | A   A | ≡   ≡   ≡   ≡ | ⫶≡   ≡⫶ | ≣▾   ≣▾ | ⫶↕ | ↶   ↷ | ❝▾ | ⊞   ⋯

Dear ${Requests.Contact.Salutation} ${Requests.Contact.First Name} ${Requests.Contact.Last Name} ,

A new request ${Requests.Request Name} # has been created for you. Please find the details below:

Heading	Value
Summary	${Requests.Summary}
Priority	${Requests.Priority}
Due Date	${Requests.Due Date}

For further information, please contact us at support@zohofsm.com.

Thanks,
FSM Team

+ Add Placeholders Or Type "#" to add the Placeholder   🔗 Attach

                                                    Cancel   Save & Preview

4. From the **Choose Actual data to preview** dropdown, choose a record. The template will be populated with the details of the selected record.

Email Template Preview   ✕

Template Name - **New Request**   Choose Actual data to preview | Sample Data ⌄ |

Dear Mr./Mrs. Contact First Name Contact Last Name ,

A new request Sample Request has been created for you. Please find the details below:

Request Attribute	Request Value
Summary	Sample Summary
Priority	low
Due Date	Dec 25, 2022

For further information, please contact us at support@zohofsm.com.

Thanks,
Zylker Team

Cancel   **Send Test Email**

5. Click **Send Test Email**.

A test email will be sent to the Super Admin of the organization.

Email Template Preview   ✕

Template Name - New Request   Choose Actual data to preview   REQ3 ⌄

Dear Ms. Helen Fahey ,

A new request REQ3 has been created for you. Please find the details below:

Request Attribute	Request Value
Summary	Leaking faucet
Priority	High
Due Date	Dec 20, 2022

For further information, please contact us at support@zohofsm.com.

Thanks,
Zylker Team

Cancel   **Send Test Email**

Example

Notify the contact when a new request is created is for them.

1. Navigate to **Setup** > **Email** > **Email Template** and click **Create New**.
2. Enter the following details, then click **Next**:
   a. **Template Name**: New Request
   b. **Choose Module**: Requests
   c. **Description**: Notify the user when a new request is created for them

3. In the *Template Builder*, add the following in the body of the email and click **Save & Preview**.

Dear ${Requests.Contact.Salutation} ${Requests.Contact.First Name} ${Requests.Contact.Last Name} ,

A new request ${Requests.Request Name} has been created for you. Please find the details below:

Request Attribute	Request Value
Summary	${Requests.Summary}
Priority	${Requests.Priority}
Due Date	${Requests.Due Date}

For further information, please contact us at support@zohofsm.com.

Thanks,

${Organization.Organization Name} Team

Manage Email Templates

You can edit, delete, or preview the email templates. If an email template is associated with an email notification, you cannot delete it.
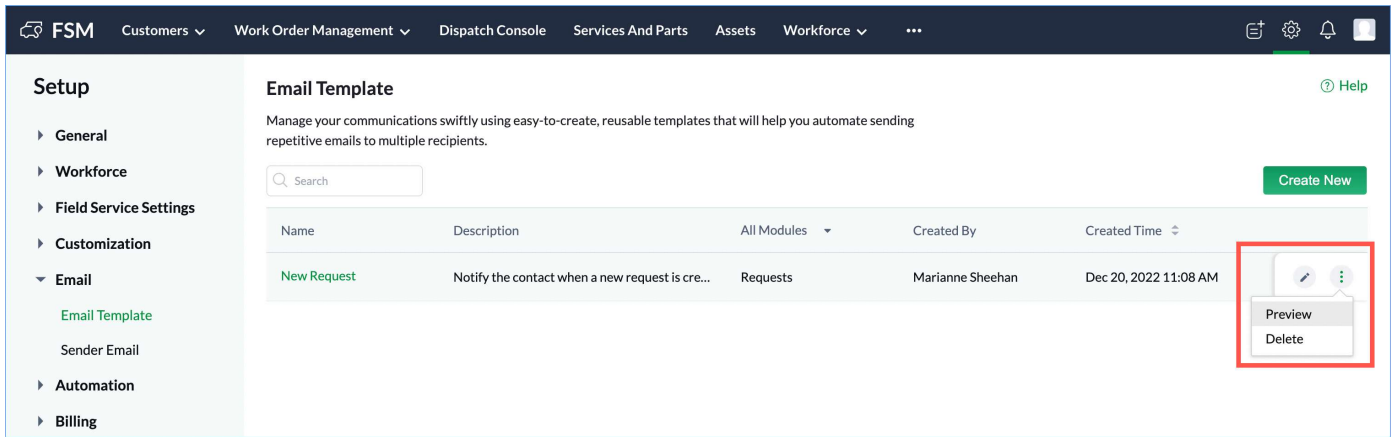
How do I set an email template as the default template for a module?

1. Hover over the desired template and click on the **More Options** [⋮] icon.
2. Click on **Set as Default**.
3. In the confirmation message, click **Yes, Proceed**

The default template will be applied in the following places:

- The template you use to email an estimate
- In the Template dropdown in the **Send Service Report** overlay.

Points to Remember

1. In the Standard edition, you can include a maximum of 10 attachments in the email provided their combined size is only upto 3 MB. In the Professional edition, you can include a maximum of 10 attachments in the email provided their combined size is only upto 5 MB. In the Free edition, you can include a single attachment in the email with size upto 3 MB. Attachments will only be supported in the Standard edition. The files types supported are .jpg, .png, .gif, .jpeg, .tiff, .ief, .pdf, .docx, .xlsx, .csv, .txt, .bmp, .vcf, .xls, and .xml.
2. While creating templates for a module, you can include the field values of other related modules. The Organization details will be available for all modules.

Module Selected	Related Modules
Contacts	Companies
Companies	-
Requests	Companies Contacts

	Assets
Estimates	Work Orders (Parent Work Order) Requests Companies Contacts Assets
Work Orders	Estimates Requests Assets Companies Contacts
Service Appointments	Companies Contacts Assets
Services And Parts	Companies Contacts
Assets	Services And Parts Companies Contacts
Trips	Service Appointments
Time Sheets	Service Appointments

https://help.zoho.com/portal/en/kb/fsm/email/articles/emailtemplates#Create_Email_Templates