

Email Templates

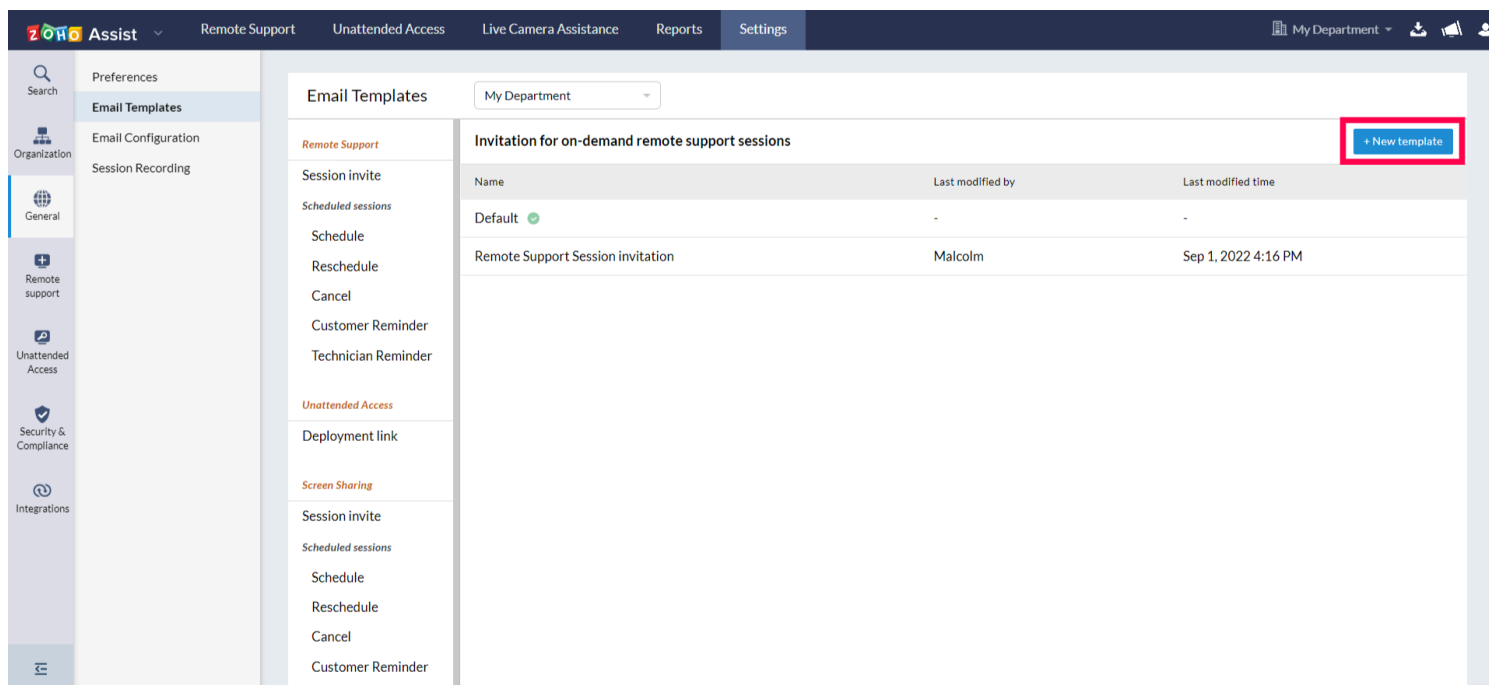
Create new templates to suit your organization prospects or use the default templates for remote support, unattended access and screen sharing sessions. Save the template and edit it further if needed. Now you can simply go ahead and add your flavor to invite your customers with style.

You get the following customization options:

- Use dynamic custom fields and position them in your invitations as you wish.
- Customize the email content using formatting tools.
- Preview, clone or edit the mail template whenever needed.

Steps

1. In **Settings**, go to **General** and choose **Email Templates**.
2. Select the type of session for which you want the email to be created.
3. Click on **New template** given on the top right corner of the page to start creating a new template.



The screenshot shows the Zoho Assist web interface. The top navigation bar includes 'Assist', 'Remote Support', 'Unattended Access', 'Live Camera Assistance', 'Reports', and 'Settings'. The left sidebar has a search bar and categories like 'Organization', 'General', 'Remote support', 'Unattended Access', 'Security & Compliance', and 'Integrations'. The 'Email Templates' section is selected in the sidebar. The main content area shows a table of templates for 'Remote Support' sessions. A '+ New template' button is highlighted with a red box in the top right corner of the table.

Name	Last modified by	Last modified time
Default	-	-
Remote Support Session invitation	Malcolm	Sep 1, 2022 4:16 PM

4. Enter the template name, subject and the message body for the email.
5. Basic editing icons are present on the top of the page.
6. Choose **Insert custom fields** given beside **Subject** to add the technician's name, customer's name, and organization's name to your email subject.

7. Choose **Insert custom fields** given beside **Mail body** to add the technician's name, customer's name, organization's name and the joining link to your email.
8. **Preview** the email created and click **Save** for future use of the customized email template.
9. Click on **Select this template** for the template to be used the next time a mail is sent.

zoho Assist Remote Support Unattended Access Live Camera Assistance Reports Settings My Department

Search Preferences
Email Templates
Email Configuration
Session Recording
General
Remote support
Unattended Access
Security & Compliance
Integrations

Remote Support
Session invite
Scheduled sessions
Schedule
Reschedule
Cancel
Customer Reminder
Technician Reminder
Unattended Access
Deployment link
Screen Sharing
Session invite
Scheduled sessions
Schedule
Reschedule
Cancel
Customer Reminder
Technician Reminder
Other Invites

New Template - Invitation for on-demand remote support sessions

Template name *
Zylker Support

Subject *
Zylker - Remote Support Session

Mail body Insert custom fields

B I U Arial 12 A [Formatting icons]

Hello {customer_name},
I've initiated a remote support session to assist you better. Please join my session by clicking the below link and follow the instructions.

{join_session}

Thanks,
{technician_name}
{org_name}

☒ Select this template

PREVIEW SAVE