



EMAIL TEMPLATES

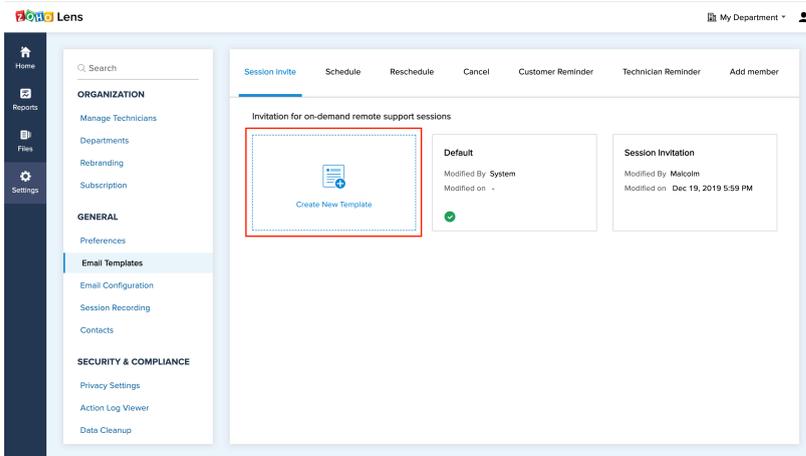
Create new templates to suit your organization's needs or use the default templates and edit them as required to align your invites to customers with your company style.

You can use our customization options to:

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

Steps

- Go to **General** under *Settings* and choose **Email Templates**.
- Select the activity you want to create the template for.
- Click **Create New Template** (highlighted in the screenshot below) to start creating a new template.



- Enter the template name, subject, and message body for the email.
- Use the basic editing icons at the top of the page.
- Choose **Insert custom fields** next to *Subject* to add the technician's name, customer's name, and organization's name to your email subject.
- Choose **Insert custom fields** next to *Mail body* to add the technician's name, customer's name, organization's name, and joining link to your email.
- Preview the email and click **Save** to save the customized email template for future use.
- Click **Select this template** to use the template the next time an email is sent.

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Session Invite Schedule Reschedule Cancel Customer Reminder Technician Reminder Add member

Edit Template -Session Invitation

Template name
Session Invitation

Subject
Zoho Lens - Remote assistance

Mail body

Hello {customer_name},

I've initiated a remote 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