Overview

Email Editor helps you customize HTML and plain text emails 2Checkout sends to shoppers and resellers.

Use HTML and CSS customizations and adjust your emails to:

- Reflect your brand identity.
- Grow your conversion, retention, click-through/open rates.
- Be transparent in your communication with shoppers.

Availability

Contact the 2Checkout Sales team to have Email Editor enabled on your account.

Content translation limitations

2Checkout does not provide localized versions for custom templates you create. Should you need localized versions for your own templates, add them manually to the Email Editor, for each language.

Email Editor does not support batch email importing at this time.

Simple vs. Advanced customization

Email Editor is available in two versions, each with their own specific set of functionalities.

Depending on the type of access to the Email Editor, you will be able to perform specific actions on any of the above emails, as follows:

On the Standard Email Editor:

- View HTML/text content for your emails, preview them and send test emails.
- Create custom themes and apply them to your emails.
- Use available variables to place dynamic content in your themes (such as images, support information, etc.) Please
check this section to retrieve information on available variables, their description, and default preview values.

On the Advanced Email Editor:

- View HTML/text content for your emails, preview them and send test emails.
- Create custom themes (master layouts) and apply them to your emails.
- Create custom content for your emails (both styling and content customization are available). Build multiple drafts of your emails and activate one of them when ready.

Use available variables to place dynamic content in your emails (such as first name, last name, order reference number, etc.) Please check this section to retrieve information on available variables, their description, and default preview values.

Themes

Themes govern common elements to multiple emails, such as the header and footer. Define themes to reflect these common parts of your emails – and later on, apply them to part/all of your emails (without having to re-write the same part of the HTML code multiple times).

Content is specific to each individual type of email and varies depending on the event that triggers the message.

[% $EMAIL_CONTENT %] VARIABLE

The [% $EMAIL_CONTENT %] variable holds the content of each email. This variable is mandatory when saving changes to a theme.

MASTER THEMES

By default, all emails use one of the two versions of 2Checkout Master Themes:

- Streamlined– for those emails redesigned during 2016.
- Standard– for the rest of the emails.

2Checkout applies the theme of your choice to the content specific to each email.

CREATE CUSTOM THEMES

Custom themes are available to all accounts and both the Standard and Advanced versions of the Email Editor. You can:

- Create themes using content from the default ones (as a starting point)
- Create themes from scratch
HOW TO INCLUDE CONTENT IN EMAILS

Include the mandatory [% $EMAIL_CONTENT %] variable when creating your theme to show the content of your emails. [% $EMAIL_CONTENT %] contains information specific to each standalone email, essentially everything between the header and footer, such as details related to shoppers, payment, billing, delivery/fulfillment, activation, subscription, etc.

The content that is specific to each individual email will be included inside your theme, as per your choice.

The following customization tools are available in the theme editor:

• **HTML and text support**: 2Checkout sends the relevant version of the theme automatically, depending on whether a shopper’s email server accepts HTML messages or just plain text.

• **Language support**: Create localized versions of your themes that 2Checkout uses automatically depending on the language of the email we send out.

• **Preview**: Preview your changes at any time (please note the static body content in the preview window is replaced by individual email content – depending on the email you applied the theme to).

• **Send test emails**: Send test emails from the preview window and verify how the theme is rendered on various email clients, devices, etc.

As soon as your theme is ready, apply it to your emails. Themes are optional, but you can use them to simplify email customization tasks by managing shared content in a single place rather than for each standalone email.

RECOMMENDED EMAIL THEME STRUCTURE

**Header**

Use this section to customize template elements such as:

• Company logo
• Company name
• Template header color

**Body**

This section should contain the largest chunk of information in the template. This is also where you must place the [% $EMAIL_CONTENT %] variable.

**Footer**

Use this section of the template to include specific information about your company and/or services that might prove useful to your shoppers, such as:

• Contact email address
• Company address
HTML vs Text

Email Editor supports both HTML and plain text email templates. Using HTML email templates requires that your shoppers’ email servers support the HTML format.

BEST PRACTICE

To avoid email delivery errors, we recommend that you always set a plain text version of your emails as backup. This way, if a shopper’s email server does not support HTML they can still receive the plain text version.

Emails

2Checkout sends out emails on your behalf with content that is specific to the event triggering the email. By using the Email Editor (no matter the type of access Standard/Advanced), you are able to view the content and the theme applied, preview and send test emails (basically stay up to date with the emails that your shoppers and partners receive).

<table>
<thead>
<tr>
<th>Category</th>
<th>Template name</th>
<th>Scenario</th>
<th>Email type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Electronic delivery</td>
<td>Sent for products delivered by 2Checkout. Includes keys (activation codes), product files and additional product delivery information.</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Payment receipt</td>
<td>Sent upon successful payment authorization. Includes information on the order placed (products, quantity, unit prices, taxes, discounts, billing and delivery information).</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Electronic delivery and</td>
<td>Sent if your account is</td>
<td>Transactional</td>
</tr>
<tr>
<td>Category</td>
<td>Template name</td>
<td>Scenario</td>
<td>Email type</td>
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<td>--------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Payment receipt</td>
<td>setup for a combined</td>
<td>product delivery and payment receipt email (one email combining the two above).</td>
<td></td>
</tr>
<tr>
<td>Payment confirmation</td>
<td>If enabled for your</td>
<td>account, includes a short summary of the order placed (products, quantity, unit prices, taxes, discounts, billing and delivery information).</td>
<td>Transactional</td>
</tr>
<tr>
<td>Invoice</td>
<td>Sent to business</td>
<td>shoppers after the payment is approved and the order is fulfilled. Includes the final purchase invoice (attached to the email).</td>
<td>Transactional</td>
</tr>
<tr>
<td>Charge reminder</td>
<td>If enabled for your</td>
<td>account, this email reminds your shoppers about purchases they performed (so as to reduce refund/chargeback risk on the account of not associating charges on the financial statement with purchases performed in the past).</td>
<td>Transactional</td>
</tr>
<tr>
<td>Offline payments guidance</td>
<td>Sent for orders where shoppers selected offline</td>
<td></td>
<td>Transactional</td>
</tr>
<tr>
<td>Category</td>
<td>Template name</td>
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<tr>
<td></td>
<td></td>
<td>payment methods (such as bank/wire transfer). Includes instructions on next steps to complete payment.</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>If Purchase Orders are enabled for your account, this email instructs shoppers on changes of status for the Purchase Orders they placed.</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sent to your shoppers as soon as their refund request has been approved and will be processed (with the amount being transferred to their account).</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Manual renewal reminder</td>
<td>Sent according to the settings in your Control Panel. Reminds shoppers about upcoming/past due manual subscription renewals.</td>
<td>Marketing</td>
</tr>
<tr>
<td></td>
<td>Automatic renewal reminder</td>
<td>Sent according to the settings in your Control Panel. Reminds shoppers about upcoming/past due automatic renewals of their subscriptions.</td>
<td>Transactional</td>
</tr>
<tr>
<td>Category</td>
<td>Template name</td>
<td>Scenario</td>
<td>Email type</td>
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<tr>
<td></td>
<td>Trial expiration notification</td>
<td>Sent 5 days before trial expiration. Reminds the shopper about the upcoming automatic charge (to convert to the paid version of the product).</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Subscription price changed</td>
<td>Sent to your shoppers if the subscription renewal price has been modified. Includes information on the product generating the subscription, next renewal date and price and previous subscription price.</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Automatic billing canceled</td>
<td>Sent to your shoppers if automatic renewal of their subscription is stopped.</td>
<td>Transactional</td>
</tr>
<tr>
<td></td>
<td>Trial canceled</td>
<td>Sent to your shoppers if the automatic charge for converting to the paid product has been canceled.</td>
<td>Transactional</td>
</tr>
<tr>
<td>Dunning</td>
<td>Payment failed (instant payment methods)</td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed manual payments (on instant payment methods such)</td>
<td>Marketing</td>
</tr>
<tr>
<td>Category</td>
<td>Template name</td>
<td>Scenario</td>
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<td>as Visa/Mastercard, PayPal, etc.).</td>
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<td></td>
<td>Recurring payment failed (instant payment methods)</td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed automatic payments (for automatic renewals that could not be performed due to insufficient funds).</td>
<td>Marketing</td>
</tr>
<tr>
<td></td>
<td>Payment failed (offline payment methods)</td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed manual payments (on offline payment methods such as bank/wire transfer, etc.).</td>
<td>Marketing</td>
</tr>
<tr>
<td></td>
<td>Recurring payment failed (dunning notification)</td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed automatic payments (for automatic renewals that could not be performed – having hard decline as a reason for failure).</td>
<td>Marketing</td>
</tr>
<tr>
<td>Category</td>
<td>Template name</td>
<td>Scenario</td>
<td>Email type</td>
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<td>--------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Abandoned cart</td>
<td></td>
<td>Sent according to the settings you perform in your Control Panel to notify about them having abandoned the cart without placing the order (it includes a link to the saved cart and potential discounts as per your setup).</td>
<td>Marketing</td>
</tr>
<tr>
<td>Payment failed (Direct Debit)</td>
<td></td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed manual payments (on Direct Debit).</td>
<td>Marketing</td>
</tr>
<tr>
<td>Recurring payment failed (Direct Debit)</td>
<td></td>
<td>Sent according to the settings you perform in your Control Panel to inform the shoppers about failed automatic payments (on Direct Debit).</td>
<td>Marketing</td>
</tr>
<tr>
<td>Free trial download expiration</td>
<td></td>
<td>Sent to your shoppers for trial downloads. Includes a link to the paid product and potential discounts as per your setup.</td>
<td>Marketing</td>
</tr>
</tbody>
</table>

**Editor use cases**

https://knowledgecenter.2checkout.com/Documentation/11Emails/Email-Editor

Updated: Sat, 14 Mar 2020 01:14:22 GMT
CREATE NEW THEMES

To build a new theme from the ground up, click **New theme** and use the editor to add theme elements:

1. Select the theme language.
2. Add your HTML and CSS code in the editor.
3. Check out documentation area to find out what variables you can include in your theme
4. Click **Copy to language** to copy the new theme content to multiple languages.
   - 2Checkout *does not* provide localized versions for custom templates you create. Should you need localized versions for your own templates, add the localized versions manually to the Email Editor, for each language.
5. Click **Save** when you’re done. Alternatively, click **Create new theme** to save a copy of the theme.

CUSTOMIZE THEMES

Alternatively, click **Customize** on a default theme and then click **Create theme copy** to build a theme based on the existing structure. You cannot modify default themes.

PREVIEW THEMES

Once you’re done editing a theme, click the Preview button to see what the template will look like to your shoppers and/or resellers with the theme you just edited. For preview only, we will be using a static email content – acting as a placeholder for the specific email content automatically included (depending on the email the theme is assigned to).

CUSTOMIZE EMAILS

To customize an email, select the desired email category and email type and click **Customize** on the draft you want to edit. If the only one available is the 2Checkout default one, you will need to click on Create draft copy to generate a custom draft. On this custom draft, you can:

1. Change the **draft name**.
2. Choose a theme to apply to your draft (this step is optional, as you can choose not to apply themes at all).
3. Click **Save** to apply the theme.
4. Select the draft language you would like to customize.
   - 2Checkout *does not* provide localized versions for custom drafts you create. Should you need localized versions for your own drafts, add the localized versions manually to Email Editor, for each language.
5. Edit the **subject** line if you want to change it. Add/edit the HTML and CSS code in the editor. Check out the documentation to find out what variables you can include in your email (there is one distinct set of variables available for each of the emails). Preview your email even before saving the changes you performed (upon clicking **Preview** you will also be asked to choose the theme you would like to preview the email with).

Click **Save** when you’re done and **Activate** the draft (for that specific email) when you feel that version is ready to be sent to your real shoppers.
Media, iframe, embed and object tags are not supported inside of a PDF.