

Email Templates Manager extension for Magento2

User Guide

version 1.0

Contents

1. Introduction	3
2. Installation	3
2.1. System Requirements	3
2.2. Installation.....	3
2.3. License.....	3
3. How to Use.....	4
3.1. Settings.....	4
Choose the necessary store view in the "Store View" dropdown to disable/enable for specific store view.	4
3.2 The List of Email Templates.....	4
3.3 Editing Email Templates	5
3.3.1 Email Header	6
3.3.2 Email Body.....	6
3.3.3 Insert Variable	6
3.3.4 Attach Files	7

1. Introduction

The document is a User Guide for extension **Email Templates Manager** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The purpose of the Email Templates Manager extension is to simplify the editing process of email templates.

Using the extension you no longer need to create hundreds of transactional emails. Now you are able to choose a system email, select a store view and edit the template.

The Email Templates Manager provides WYSIWYG. Add images, upload files, or manage styles and texts to make the emails look the way you need it. Also you can add CC or BCC, edit fields "From Name" and "From Email" for each email template.

2. Installation

2.1. System Requirements

The extension requires Magento 2.x

2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris_EmailTemplates/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_EmailTemplates  
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

2.3. License

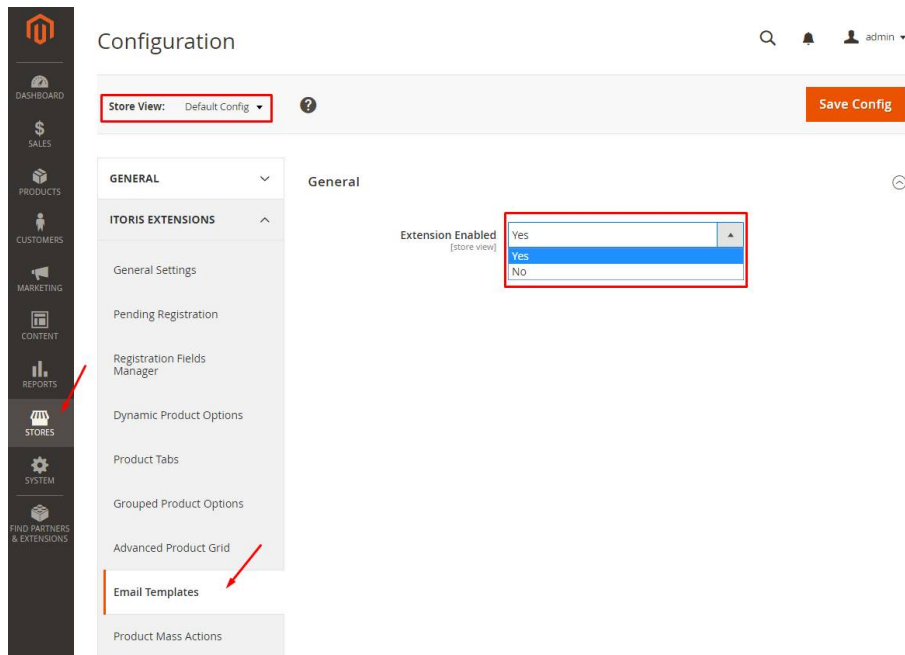
The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

<https://www.itoris.com/magento-extensions-license.html>

3. How to Use

3.1. Settings

You can find the main Settings following **STORES -> Settings -> Configuration -> ITORIS EXTENSIONS-> Email Templates -> Extension Enabled.**

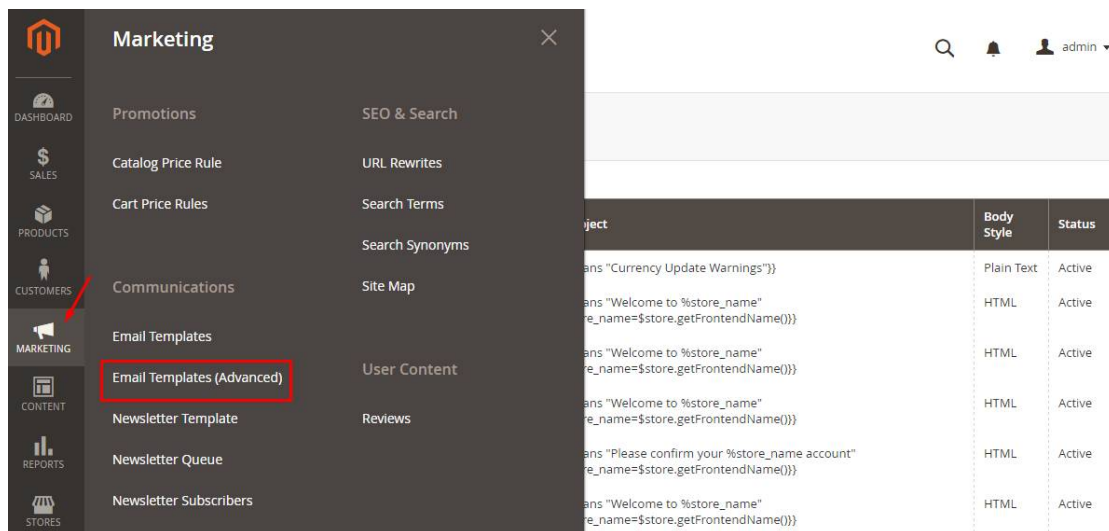


In dropdown "Extension Enabled" choose "Yes" to enable or "No" to disable the extension functionality.

Choose the necessary store view in the "Store View" dropdown to disable/enable for specific store view.

3.2 The List of Email Templates

The extension displays all Magento email templates together following: **Marketing -> Communication -> Email Templates (Advanced).** You can edit all email templates here.



When Email Templates Manager is enabled, the custom email templates created here will substitute the default Magento ones.

The screenshot shows the 'Email Templates' management interface. At the top, there's a search bar and a user profile for 'admin'. Below that, a 'Store View' dropdown is set to 'All Store Views'. The main area contains a table with the following data:

Template Name	Subject	Body Style	Status
Currency Update Warnings	{{trans "Currency Update Warnings"}}	Plain Text	Active
New Account	{{trans "Welcome to %store_name" store_name=\$store.getFrontendName()}}	HTML	Active
New Account (Magento/luma)	{{trans "Welcome to %store_name" store_name=\$store.getFrontendName()}}	HTML	Active
New Account Without Password	{{trans "Welcome to %store_name" store_name=\$store.getFrontendName()}}	HTML	Active
New Account Confirmation Key	{{trans "Please confirm your %store_name account" store_name=\$store.getFrontendName()}}	HTML	Active
New Account Confirmed	{{trans "Welcome to %store_name" store_name=\$store.getFrontendName()}}	HTML	Active
Forgot Password	{{trans "Reset your %store_name password" store_name=\$store.getFrontendName()}}	HTML	Active
Remind Password	{{trans "Reset your %store_name password" store_name=\$store.getFrontendName()}}	HTML	Active
Reset Password	{{trans "Your %store_name password has been changed" store_name=\$store.getFrontendName()}}	HTML	Active
Change Email	{{trans "Your %store_name email has been changed" store_name=\$store.getFrontendName()}}	HTML	Active

At the bottom of the table, there is a pagination control: 'Page 1 2 3 4 5 6 7 | View 10 per page | Total 63 records'.

Also you can edit email templates for different store views separately selecting a store in "Store View". You are able to change texts for stores if necessary.

3.3 Editing Email Templates

To edit an email template click on it in the list. Scroll the page down and find the "Email Configuration" section.

The screenshot shows the 'Email Configuration' interface for editing a template. At the top, there are three buttons: 'Preview Template', 'Save Template', and 'Load Default'. Below these are several form fields:

- Status:** Active (dropdown)
- Body Style:** HTML (dropdown)
- From Name:** CustomerSupport
- From Email:** support@example.com
- Subject:** {{trans "Welcome to %store_name" store_name=\$store.getFrontendName()}}
- CC:** (empty field)
- BCC:** (empty field)

Below the form fields is an 'Insert Variable...' button and a rich text editor with various formatting tools. The editor contains the following code:

```
<{{template config_path="design/email/header_template"}}>
<{{trans "%name," name=$customer.name}}>
```

The configuration provides the following settings:

"Preview Template" – click button to see the template's preview.

"Save Template" – click button to save the template.

"Load Default" – click button to load the default Magento email template.

"Status" – select "Active" in the dropdown to send the template. Only active templates will be sent.

"Body Style" – select if the template should be in the "HTML" or in the "Plain Text" format.

3.3.1 Email Header

You can find the next email header's settings:

"From Name" – allows to enter the name the email will be sent from.

"From Email" – allows to enter the email address the template will be sent from.

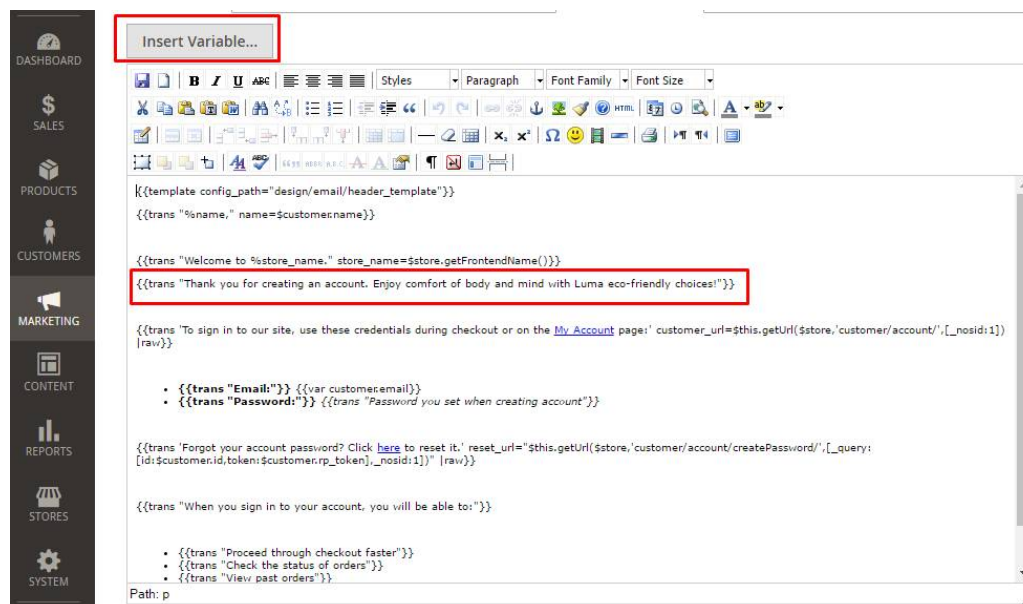
"Subject" – enter the subject of email.

"CC" – using the extension you can put an email address here if you are sending a copy and want everyone to explicitly see this.

"BCC" – using the extension you can put an email address here if you are sending a copy and do not want the other recipients to see that you sent it to a certain contact.

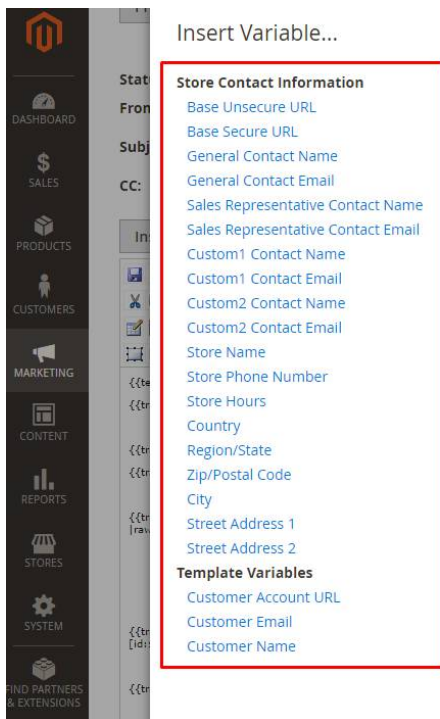
3.3.2 Email Body

Use the WYSIWYG editor to change texts the way you need it, add images or styles.



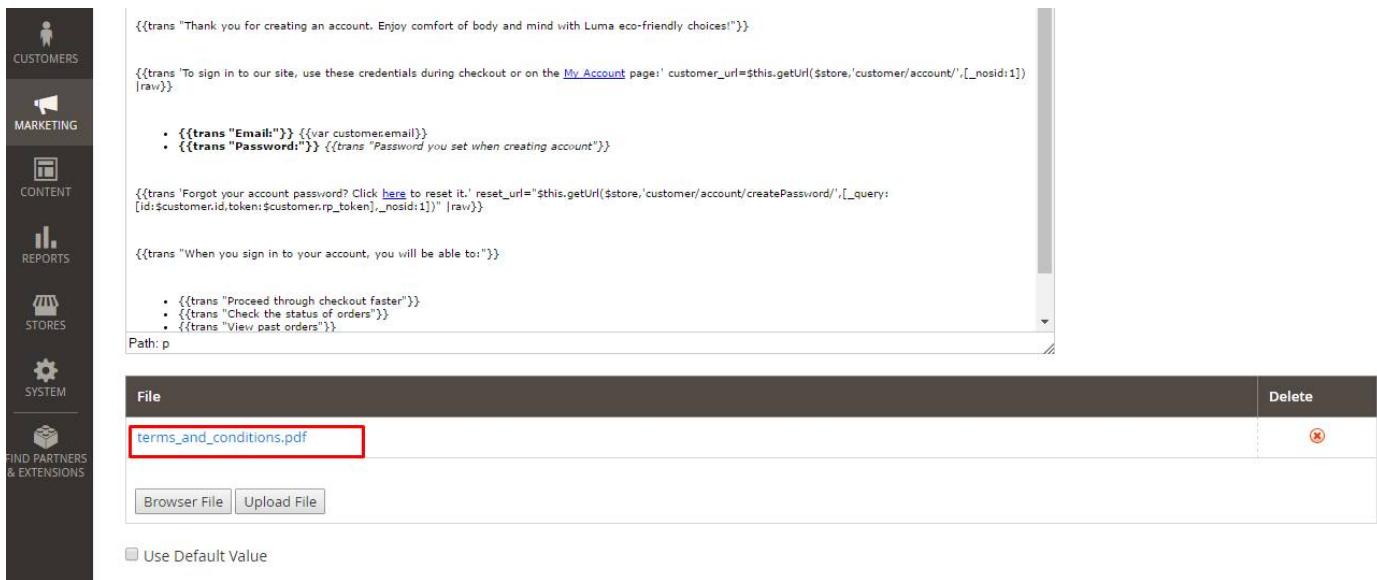
3.3.3 Insert Variable

Click "Insert Variable" to insert a system variable into email. After the popup appears choose the variable in the list. Then it will be added to your text.



3.3.4 Attach Files

By default Magento2 won't allow to attach files. Now you can attach files, documents, PDF agreements, bills and etc.



To attach a file click "Browser File", choose the file and then click button "Upload File". Your file will be displayed below the email body. To delete the file click icon "delete" next to the file.

For example, let's go to the Frontend and create a customer account. After registration the customer will get the custom email with attached file:

The screenshot shows a Gmail email from 'Liam Miller'. The email content includes a welcome message, a thank-you note for account creation, and login instructions. A red box highlights the thank-you message. Below the email, a red box highlights a thumbnail of a document titled 'terms_and_condi...'. The Gmail interface includes a left sidebar with navigation options like 'Compose', 'Inbox', and 'Sent Mail', and a top toolbar with standard email actions.

Gmail

COMPOSE

Inbox

Starred

Sent Mail

Drafts

More

Liam

Liam Miller,

Welcome to Main Website Store.

Thank you for creating an account. Enjoy comfort of body and mind with Luma eco-friendly choices!

To sign in to our site, use these credentials during checkout or on the [My Account](#) page:

- Email: liammiller619@gmail.com
- Password: Password you set when creating account

Forgot your account password? [Click here](#) to reset it.

When you sign in to your account, you will be able to:

- Proceed through checkout faster
- Check the status of orders
- View past orders
- Store alternative addresses (for shipping to multiple family members and friends)

About Us
Customer Service

terms_and_condi...