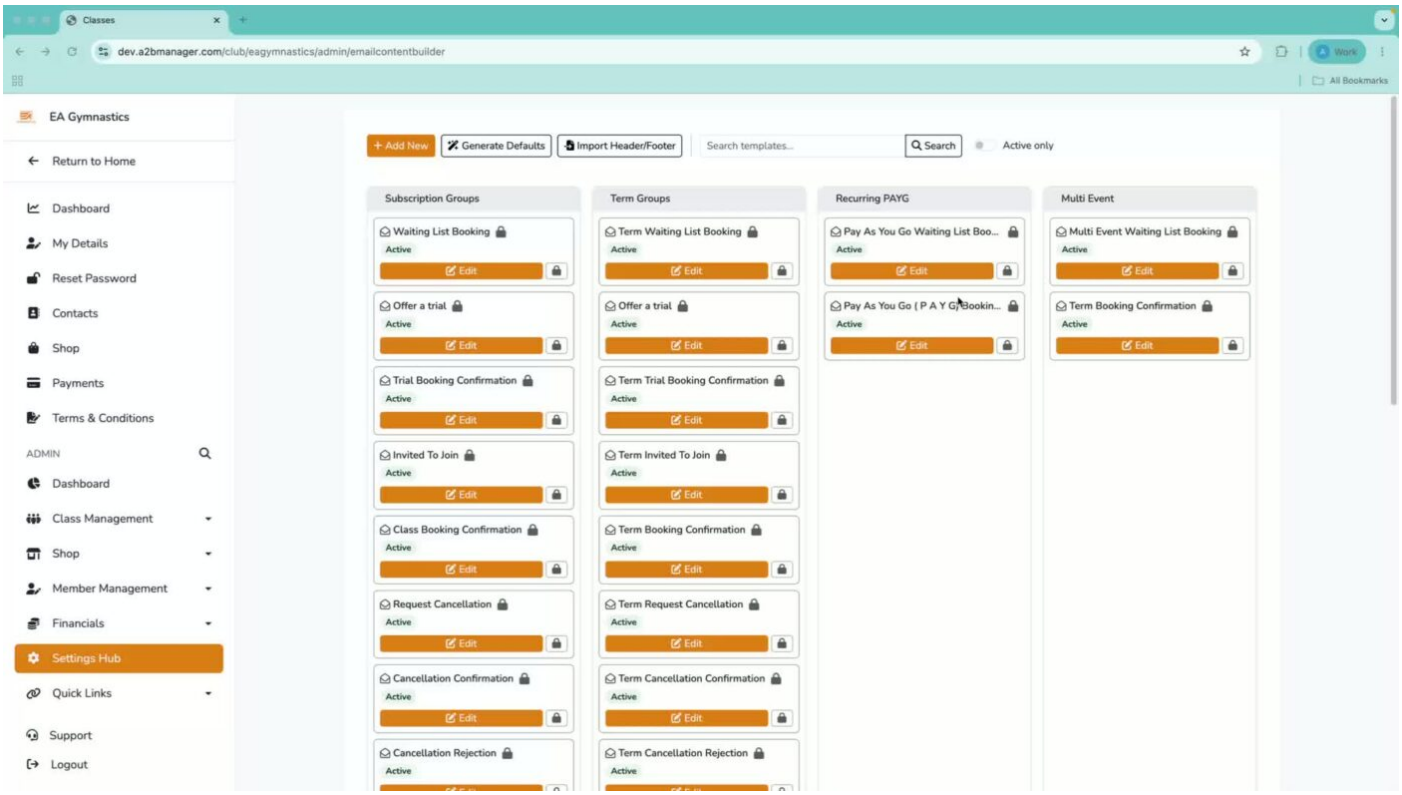
Edit Email Templates

Emails · https://a2bmanager.com/docs/how-to-edit-email-templates-in-settings/

Embedded media: https://www.loom.com/embed/216569a51be044bcb1292a4c0b9c7337

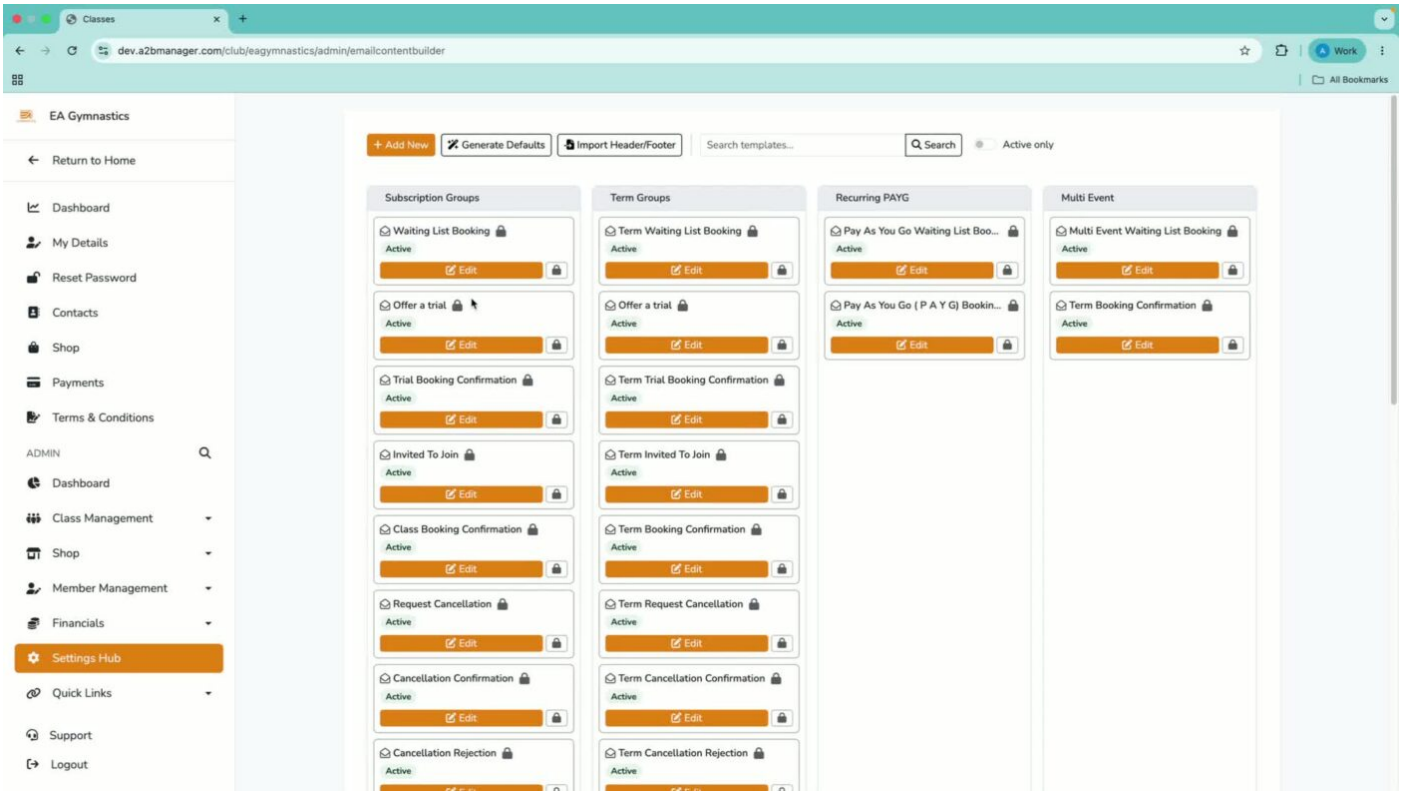
How to Edit and Configure an Email Template

1. Open the Email Template Builder 0:00



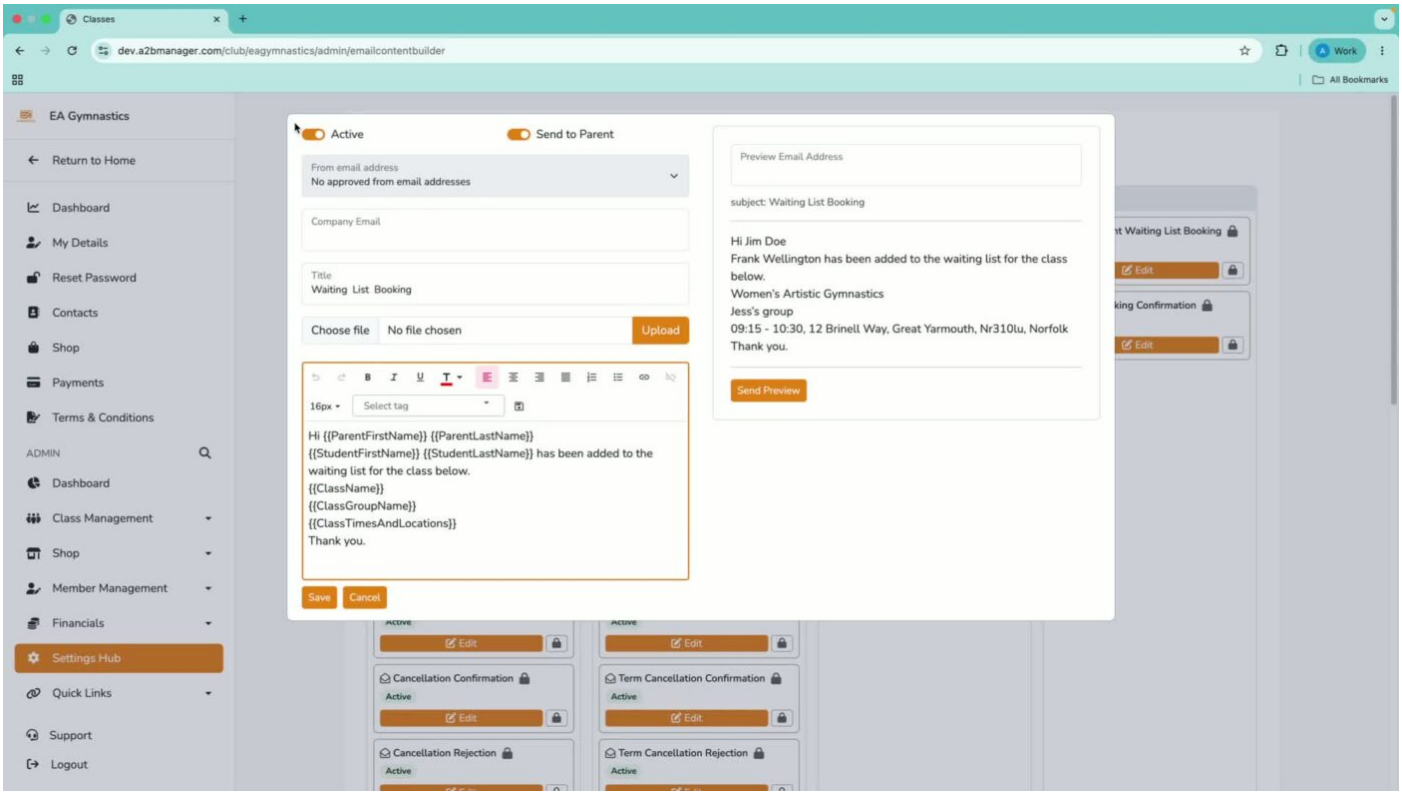
- Go to the **Settings Hub**.
- Open the **Email Template Builder**.
- You'll see a list of all available email templates.

2. Open the Template You Want to Edit 0:19



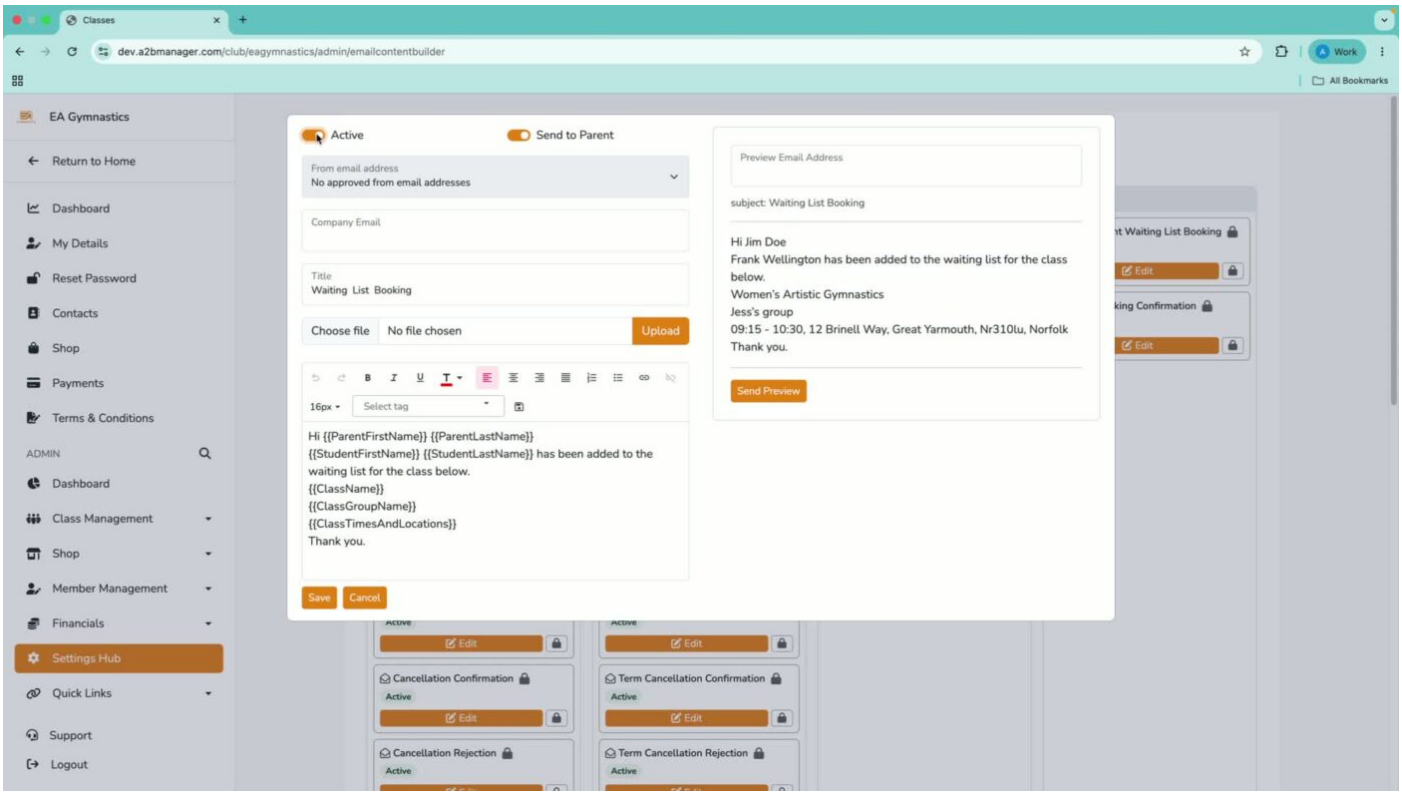
- Click the **Edit** button on the email template you want to change.
- This opens the template editor where you can adjust the email's settings and content.

3. Turn the Email On or Off 0:29



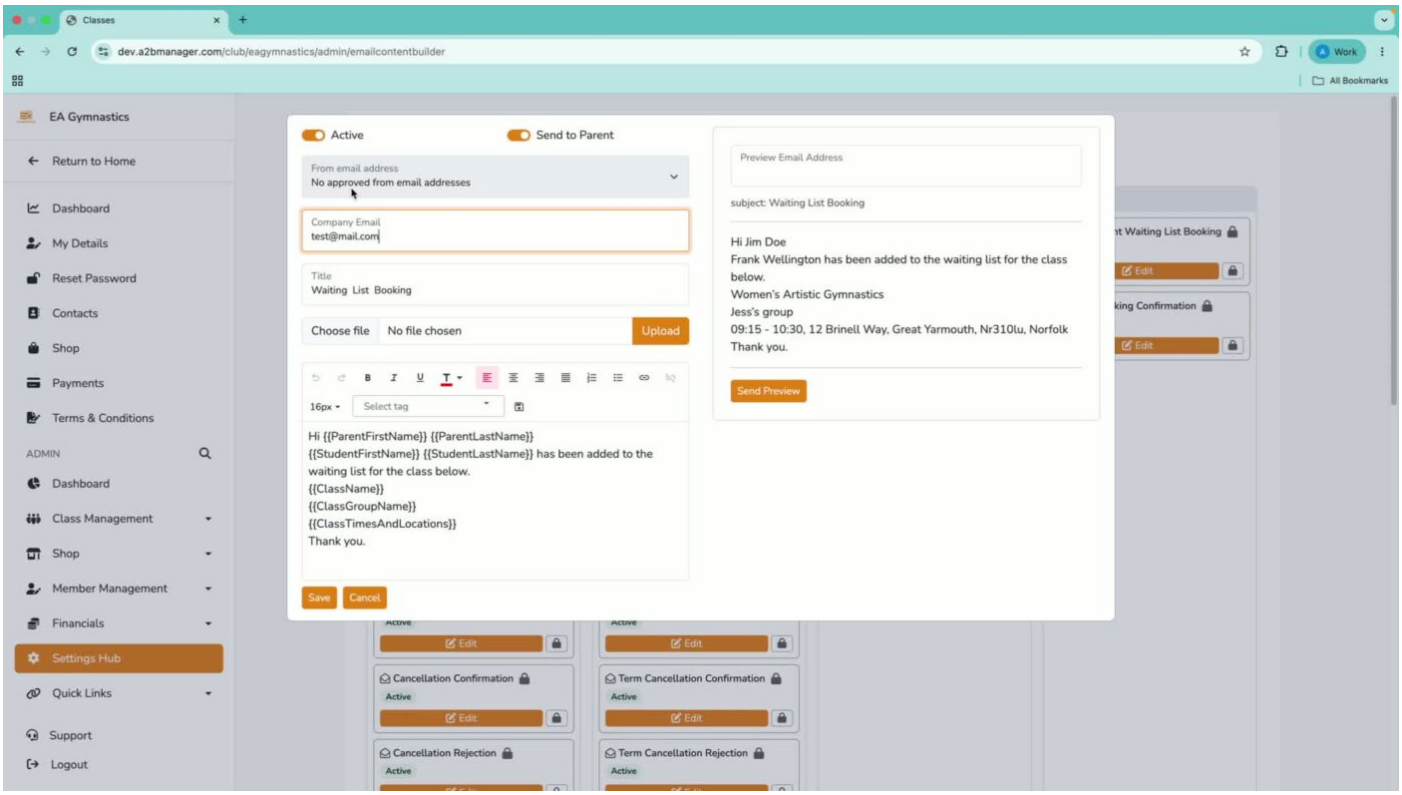
- Use the **Active** toggle at the top of the template.
- **On** = the email will be sent when triggered.
- **Off** = the email will not be sent at all.

4. Choose Who Receives the Email 0:44



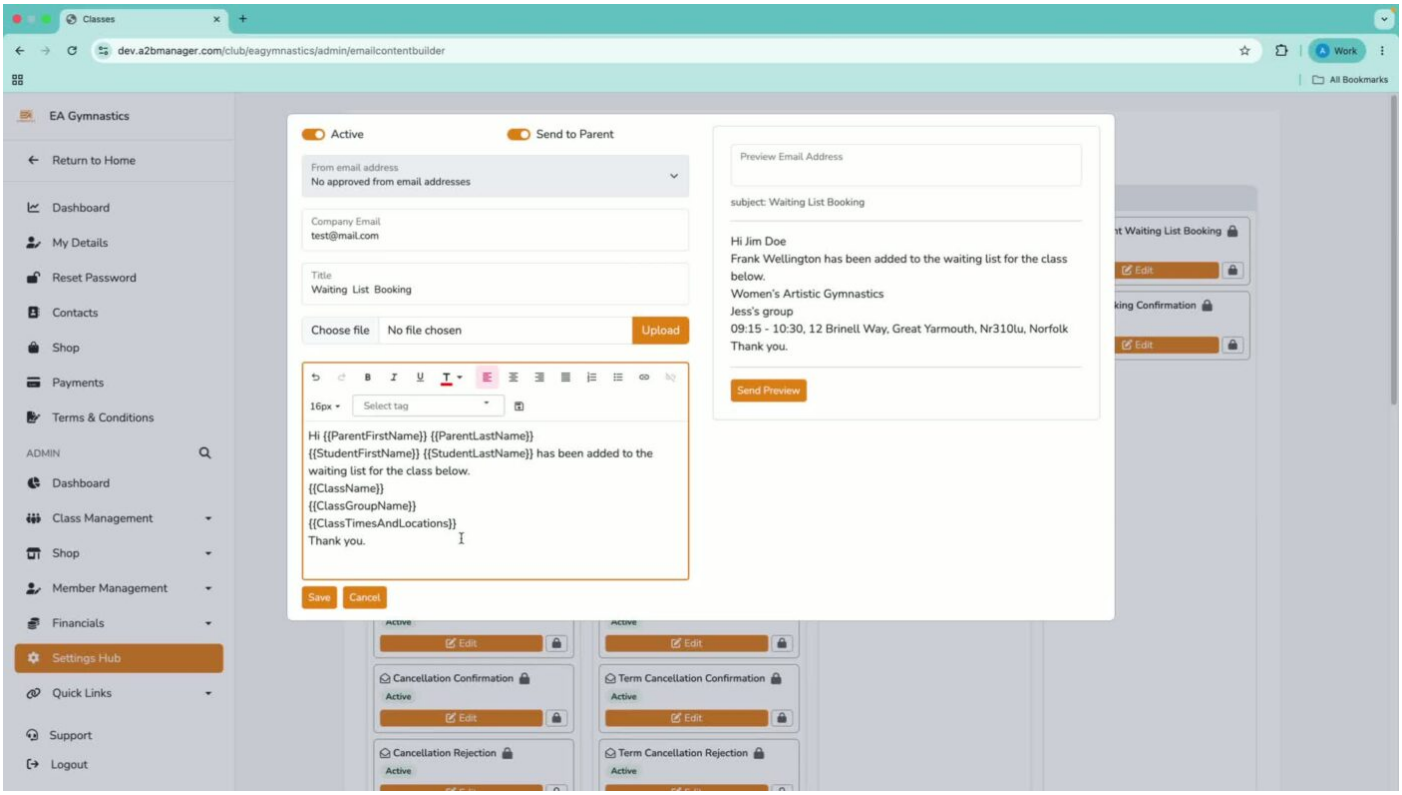
- Use the **Send to Parent** option to control delivery.
- If disabled, the email can be sent only to your internal/company email address.
- If enabled, the email goes to the parent and can also be copied to your company email.
- This is useful when you want the parent to receive a confirmation while your team is also notified.

5. Update the Email Details 1:20



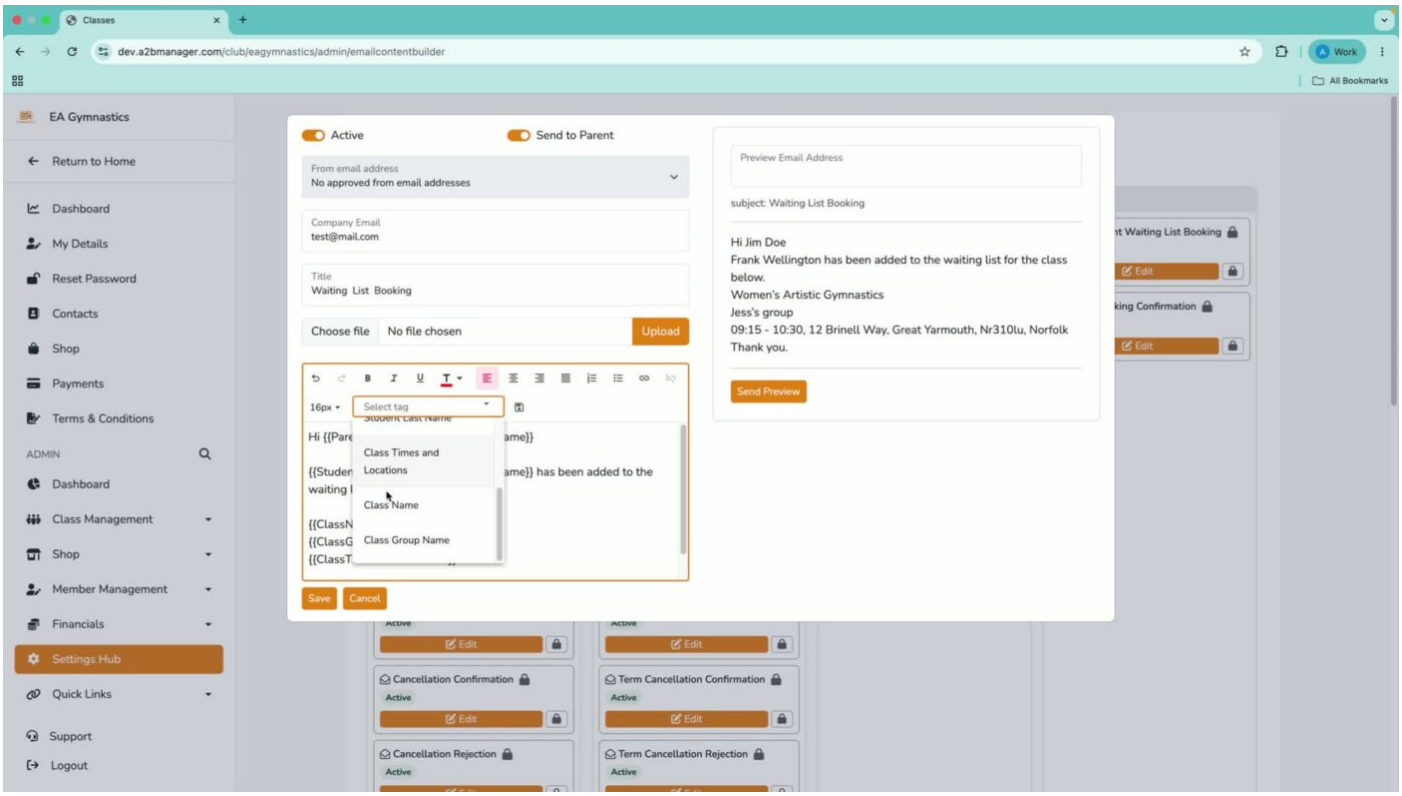
- Edit the **subject** line of the email.
- Add or change the **company email address** the message is sent from.
- Upload any **files/attachments** that should be included whenever the email is sent.

6. Build and Format the Email Content 1:39



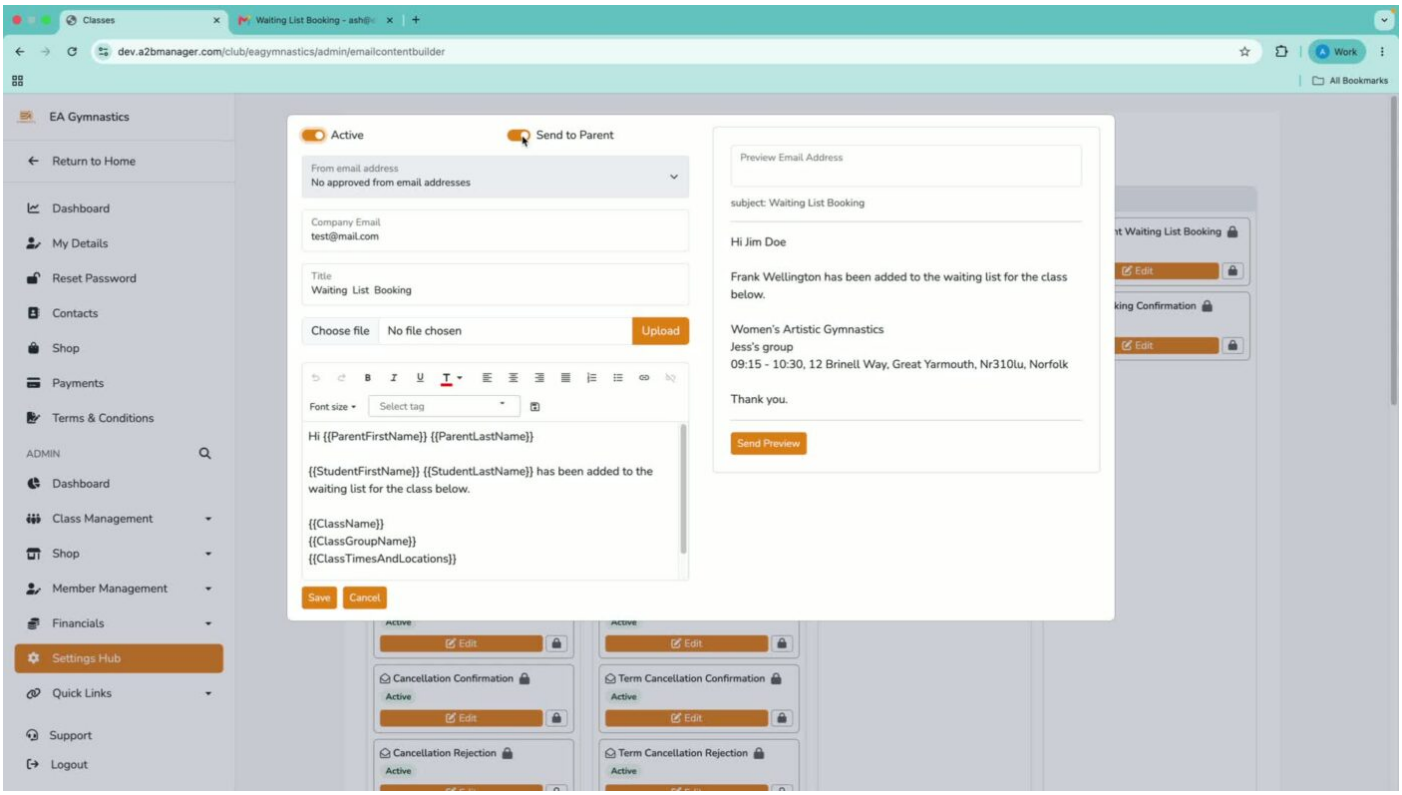
- Use the **email builder** to write and format the message.
- Insert available **tags/merge fields** to personalize the email.
- Add more tags from the tag selector as needed.
- Save your changes when the layout and content look right.

7. Preview the Email Before Saving 1:53



- Enter your own email address in the **preview** field.
- Send a preview to see exactly how the email will look in an inbox.
- Check the received preview email to confirm formatting and content.

8. Review the Final Setup 2:33



- **Active** controls whether the email sends at all.
- **Send to Parent** controls whether the parent receives it.
- You can configure the sender email in **Settings**.
- You can also edit the **subject**, add **attachments**, and build the email body in the editor.
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