



Custom Email Templates

Customize email invitations for remote support sessions so that it suits your organization prospects. Yes. It's optional and the remote support email invitation has a default template. But who wouldn't want to customize? 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 content using formatting tools.

Steps

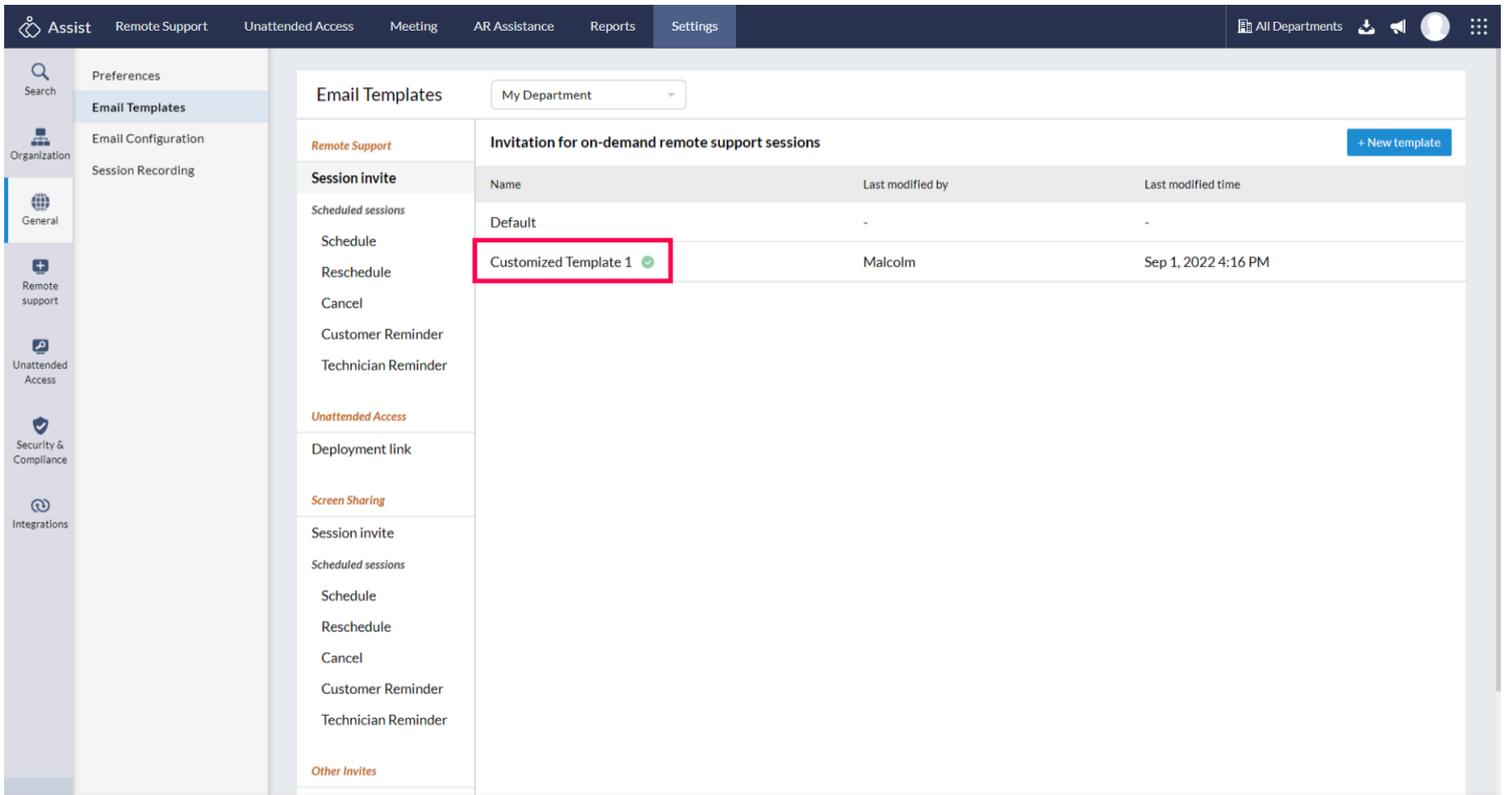
1. In **general settings** choose **Email Template**.
2. Choose **Use Default Template** to send default remote support session invites.

The screenshot shows the Zoho Assist settings interface. The top navigation bar includes 'Assist', 'Remote Support', 'Unattended Access', 'Meeting', 'AR Assistance', 'Reports', and 'Settings'. The left sidebar contains various settings categories: Search, Preferences, Email Templates (selected), Email Configuration, Session Recording, Organization, General, Remote support, Unattended Access, Security & Compliance, and Integrations. The main content area is titled 'Email Templates' and shows a dropdown menu for 'My Department'. Below this, there are sections for 'Remote Support', 'Unattended Access', 'Screen Sharing', and 'Other Invites'. The 'Remote Support' section is expanded to show 'Session invite' settings. A table lists the email templates:

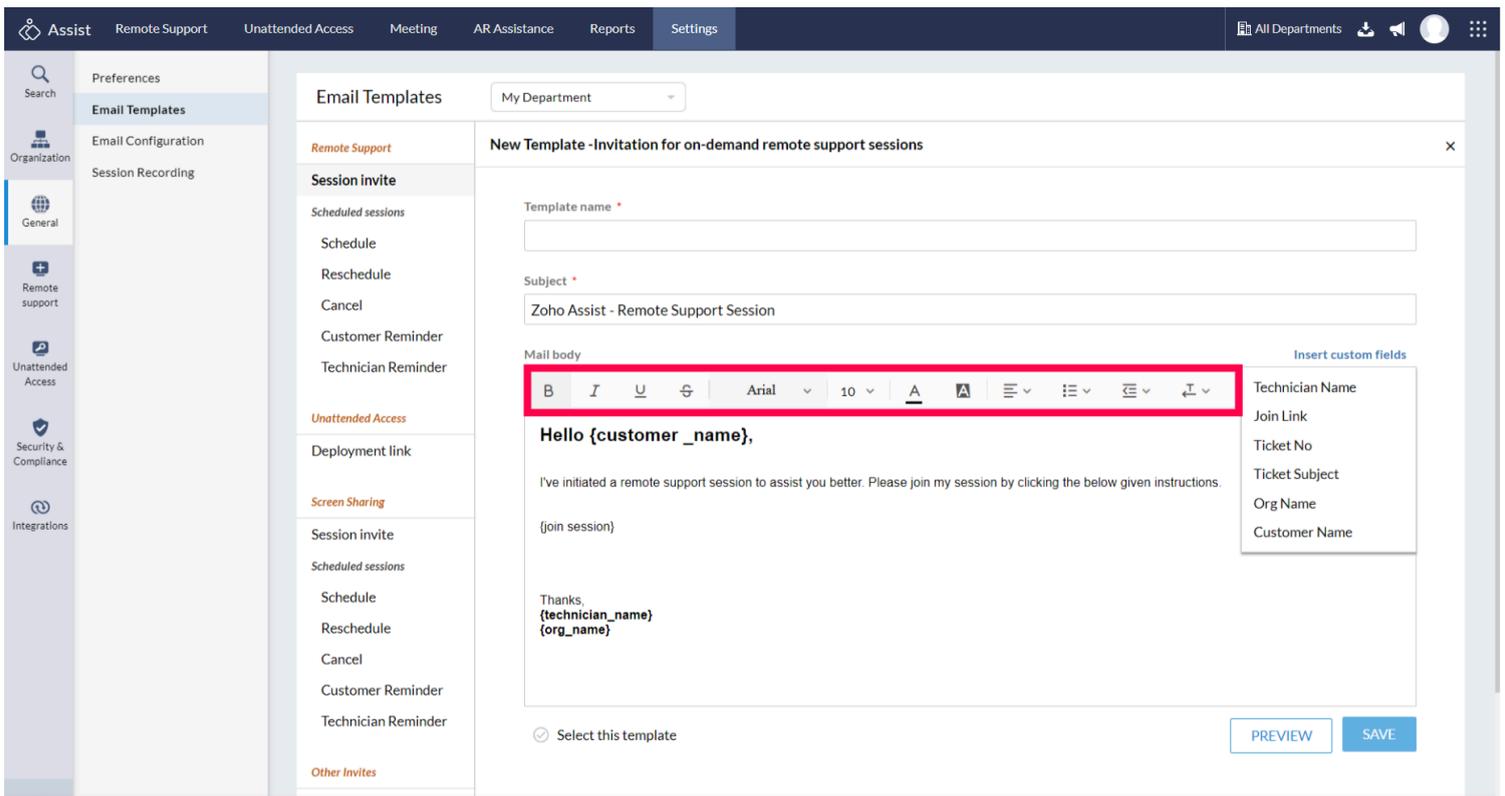
Name	Last modified by	Last modified time
Default	-	-
Customized Template 1	Malcolm	Sep 1, 2022 4:16 PM

Buttons for 'Schedule', 'Reschedule', 'Cancel', 'Customer Reminder', and 'Technician Reminder' are visible for each template. A '+ New template' button is located in the top right corner of the table area.

3. Choose **Use Customized Template** to personalize the content.



4. Basic editing tool icons are present on the top of the page.



5. Choose **Custom Fields** present on the right side of the page to add the **technician's name, customer's name, organization's name and the joining link** to your customized content.

The screenshot displays the Zoho Assist 'Email Templates' configuration interface. The main window is titled 'New Template - Invitation for on-demand remote support sessions'. It features a left sidebar with navigation options like 'Session invite', 'Scheduled sessions', 'Unattended Access', and 'Screen Sharing'. The central area contains a form with the following fields:

- Template name ***: An empty text input field.
- Subject ***: A text input field containing 'Zoho Assist - Remote Support Session'.
- Mail body**: A rich text editor containing a draft email. The draft starts with 'Hello {customer_name},', followed by a paragraph: 'I've initiated a remote support session to assist you better. Please join my session by clicking the below given instructions.' Below this is '(join session)'. The email ends with 'Thanks, {technician_name} {org_name}'.

A red box highlights the 'Insert custom fields' dropdown menu, which lists the following options:

- Technician Name
- Join Link
- Ticket No
- Ticket Subject
- Org Name
- Customer Name

At the bottom of the form, there is a radio button labeled 'Select this template' and two buttons: 'PREVIEW' and 'SAVE'.

6. Choose **Save** for future use of the customized email template.