

Email Templates

Email Templates allows you to design email templates to use when sending emails to users and resources / contractors triggered by key events in the system.

Select an email template you would like to create:

Email Template Categories:-

Jobs

Job Requests

Finance

Job Tasks

Other

Choose Email Template:

Job Report For Resource

Job Report To User

Planned Job Reminder For Assigned User

Planned Job Reminder For Resource

To Assigned User When Job Authorised

To Assigned User When Planned Job Overdue

To Assignee on new job assignment

To Assignee On New Job Note

To Authoriser On Job Requiring Authorisation

To Contractor Bundled Jobs

To internal user on new alert

To User on Job Approval

To user on job completion

To User on Key Job / Task Event

To User When Work Done Rejected

Once you have selected the template you wish to use, a text edit box will appear containing the structure of the email and a help card outlining how to customize the email, and how you can use tags to reflect live data e.g. [date] will display the current date and time.

After creating the template, select *Save*

