

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*

