Edit a System Email Template

Last Modified on 20/01/2023 4:10 pm GMT

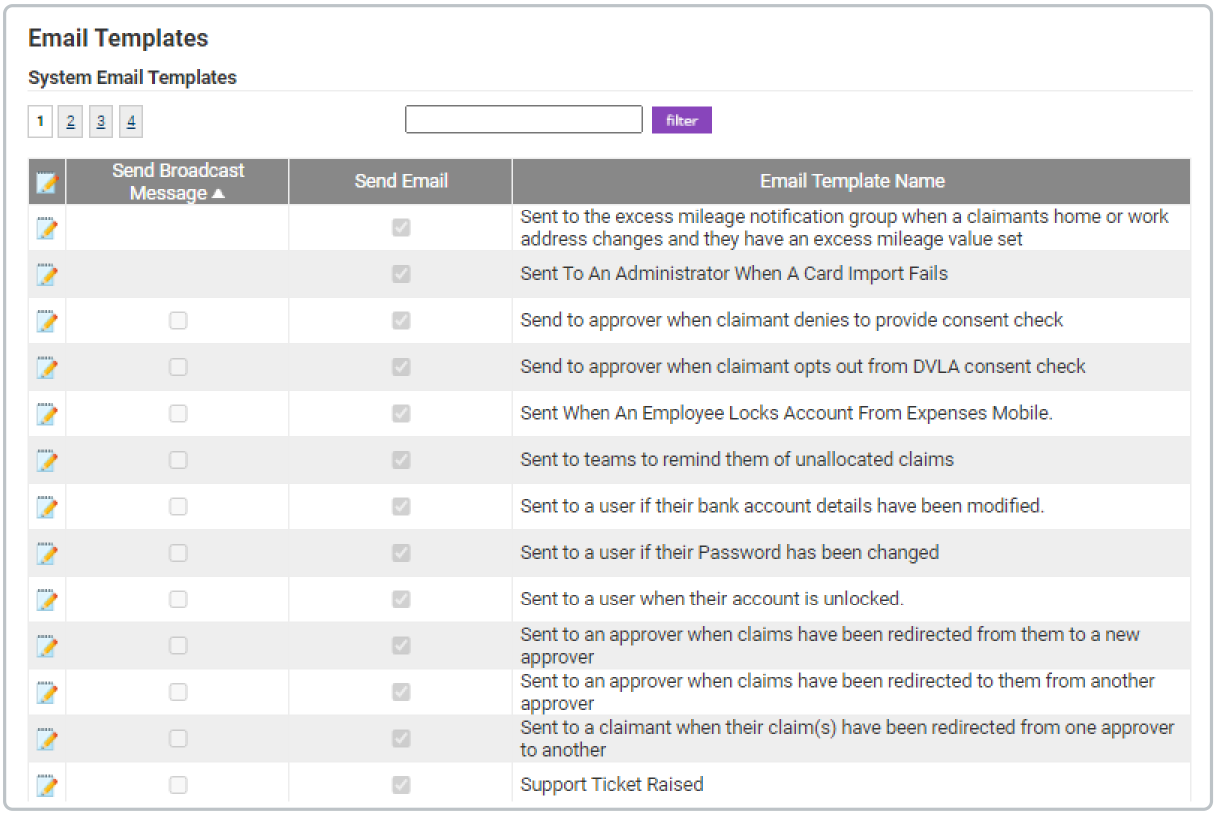
Permissions

You will require an Access Role with the following permissions:

- Administrative Settings
- Tailoring

System Email Templates cannot be added by an administrator however the content can be amended so that it meets the needs of your organisation. In order to edit an existing System Email Template, follow the steps below:

1. Navigate from the **Home** Page to **Administrative Settings | Tailoring | Email Templates**.



Email Templates

System Email Templates

1 2 3 4 filter

	Send Broadcast Message ▲	Send Email	Email Template Name
		☑	Sent to the excess mileage notification group when a claimants home or work address changes and they have an excess mileage value set
		☑	Sent To An Administrator When A Card Import Fails
	☐	☑	Send to approver when claimant denies to provide consent check
	☐	☑	Send to approver when claimant opts out from DVLA consent check
	☐	☑	Sent When An Employee Locks Account From Expenses Mobile.
	☐	☑	Sent to teams to remind them of unallocated claims
	☐	☑	Sent to a user if their bank account details have been modified.
	☐	☑	Sent to a user if their Password has been changed
	☐	☑	Sent to a user when their account is unlocked.
	☐	☑	Sent to an approver when claims have been redirected from them to a new approver
	☐	☑	Sent to an approver when claims have been redirected to them from another approver
	☐	☑	Sent to a claimant when their claim(s) have been redirected from one approver to another
	☐	☑	Support Ticket Raised

2. The **Email Templates** page will display a list of all existing System Email Templates. Click next to the System Email Template that you want to amend.

3. The **Email Template Details** screen allows you to customise the Email Template. The following fields will be displayed:

Product Area	This indicates which area of the product that the Email Template is related to. This field cannot be edited.

Template Name (Mandatory)	The name of this System Email Template.
Priority	Use the drop down box to set a priority for the email when it is sent out to users. The options available are **Low**, **Normal** and **High**.
To	The user/s that the email is sent to. For System Email Templates, this field is pre-defined based upon system configuration. For example, the email that is sent to an approver when a claimant submits their claim, will automatically be sent to the correct approver based upon the claimant's Signoff Group.
CC	Users listed in the **CC (Carbon Copy)** field will receive a copy of this email when it is sent out. Type an employee's name/email into the search field to bring back relevant search results. Click the correct name/email to add it to the **CC** field. This will display as just the email address.
BCC	Users listed in the **BCC (Blind Carbon Copy)** field will also receive a copy of this email when it is sent out. However, users in the **BCC** field will be hidden to all other recipients of this email. Type an employee's name/email into the search field to bring back relevant search results. Click the correct name/email to add it to the **BCC** field. This will display as just the email address.

Note: For both the **CC** and **BCC** fields you can click the icon which will allow you to specify the following recipients:

- Team
- Budget Holder
- Approver
- Item Owner
- Line Manager
- GreenLight Attribute (If a GreenLight has been defined within the Product Area field, you will be able to send this email to employees who appears on the GreenLight form).

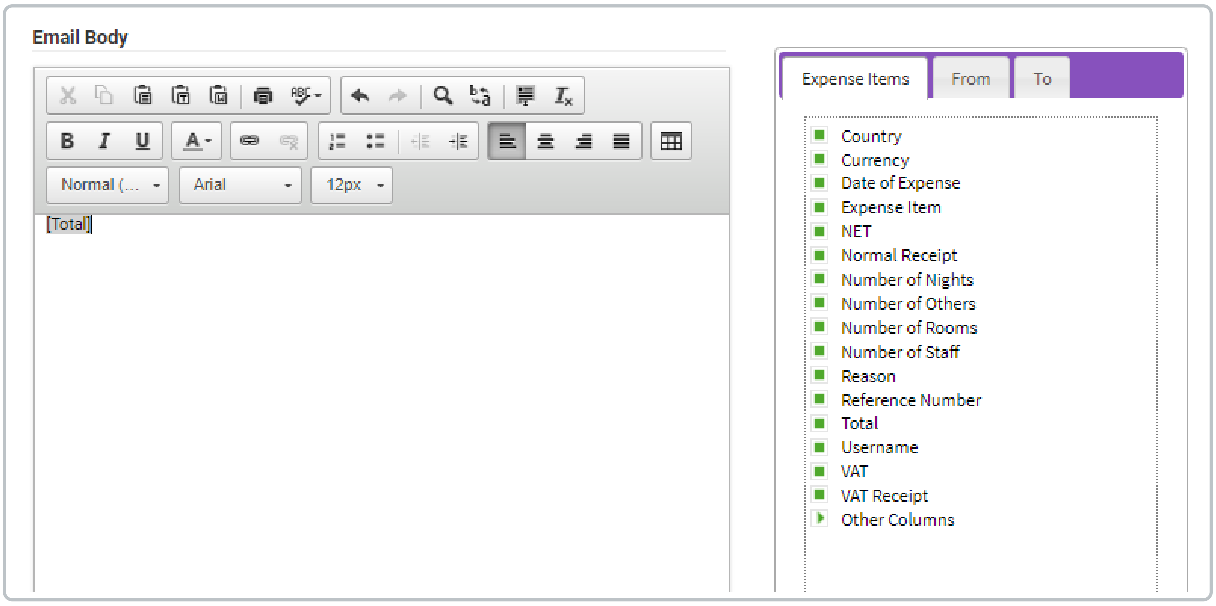
Send Email	Select this check box to send the email to the email recipients, once the relevant system event occurs.

Send Broadcast Message	Select this check box to display a Broadcast Message on the recipient's Home page. The message content is defined within the **Broadcast Messages** section, displayed at the bottom of the page.
Attachments	Click the icon to display the **Attachments** window. This will allow you to add an attachment to this email template which can be downloaded by recipients when they receive the email. You can also **View** or **Delete** any existing attachments on the Email Template. To add an attachment, click the **Add New Attachment** link. You can then specify an **Attachment Title**, **Description** and browse for a file on your computer/network. Once you have specified all of this information, click **upload**.
Subject (Mandatory)	Enter the subject of the email.

4. Customise the email content within the Email Body text editor. The text that you add can be formatted using the available options in the toolbar (hovering over an option will display the name of that option).

5. **Merge fields** can be added to the email by dragging them from the tree into either the **Subject** field or the **Body** of the email.

Add a merge field to the email Subject	Click and drag the merge field from the tree into the **Subject** field and drop it in the position that you want the merge information to be placed. You can select different merge fields by moving through the **Product Area**, **To** and **From** tabs.
Add a merge field to the Email Body	Click and drag the merge field from the tree into the body of the email and drop it in the position that you want the merge information to be placed. You can select different merge fields by moving through the **Product Area**, **To** and **From** tabs.



Tip: A merge field will allow you to automatically insert information from Assure Expenses into an email template.

For example, you can add the Sender Email Address merge field into an email template and each time this is sent to users, it will populate the sender's email address, in the location that you place the merge field.

If this field is added to the email that is sent to an administrator when a claimant has submitted their expenses, it will automatically populate the claimant's email address in place of the merge field.

6. If applicable, create a **Broadcast Message** for this email template. For more information on adding a Broadcast Message to an email template, view Add a Broadcast Message to a System Email Template.

7. Click **Save** to store the email template or click **Cancel** to discard any changes.