

Adding Variables to an Email Template

Last Modified on 09/27/2024 3:04 pm EDT

Overview

Email templates allow an Administrator to configure the information (e.g., object fields and properties) that appears on an email when the Messaging (email) Workflow is triggered.

All object type fields and properties can be added to an email template, including custom and default email templates. The available fields and properties depend on the object triggering the email.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to configure email templates.

Related Information/Setup

Please refer to the [Edit the Default Email Templates](#) article for more information on email templates.

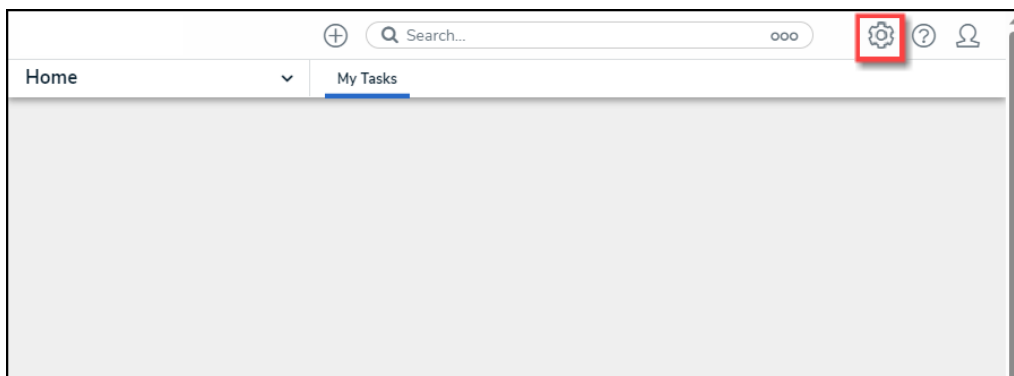
Please refer to the [Create a New Email Template](#) article for more information on creating an email template.

Please refer to the [Object Properties](#) article for more information on object properties.

Please refer to the [Markdown formatting](#) article for more information on how to apply Markdown to the email template.

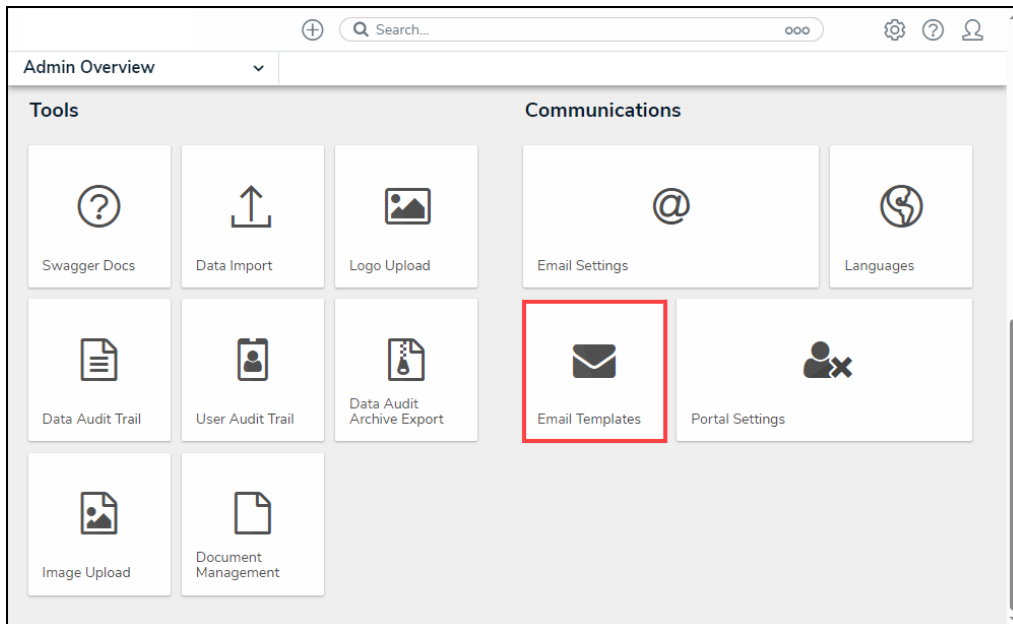
Navigation

1. From the **Home** screen, click the **System** icon.



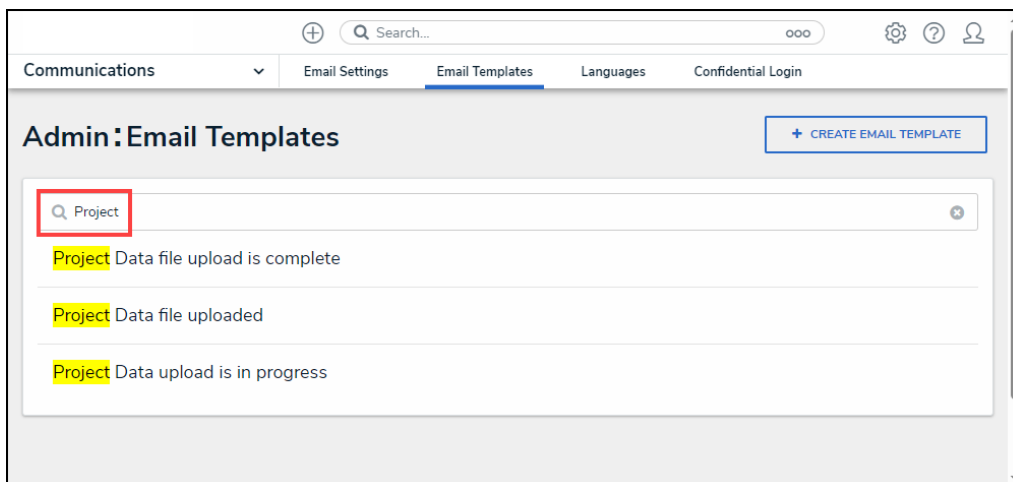
System Icon

- From the **Admin Overview** screen, click the **Email Templates** tile under the **Communication** section.



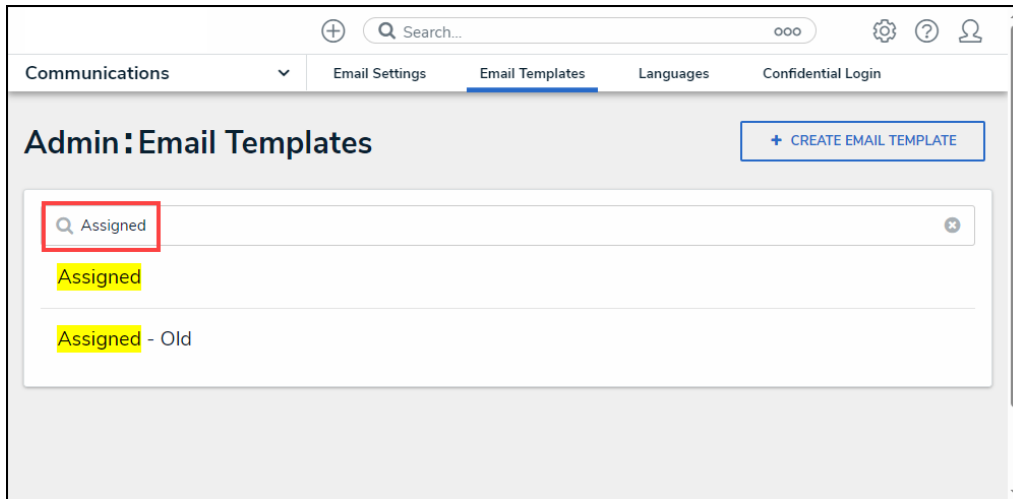
Email Template Tile

- From the **Admin: Email Templates** screen, enter a keyword in the **Search** field to narrow the search results list.



Search Field

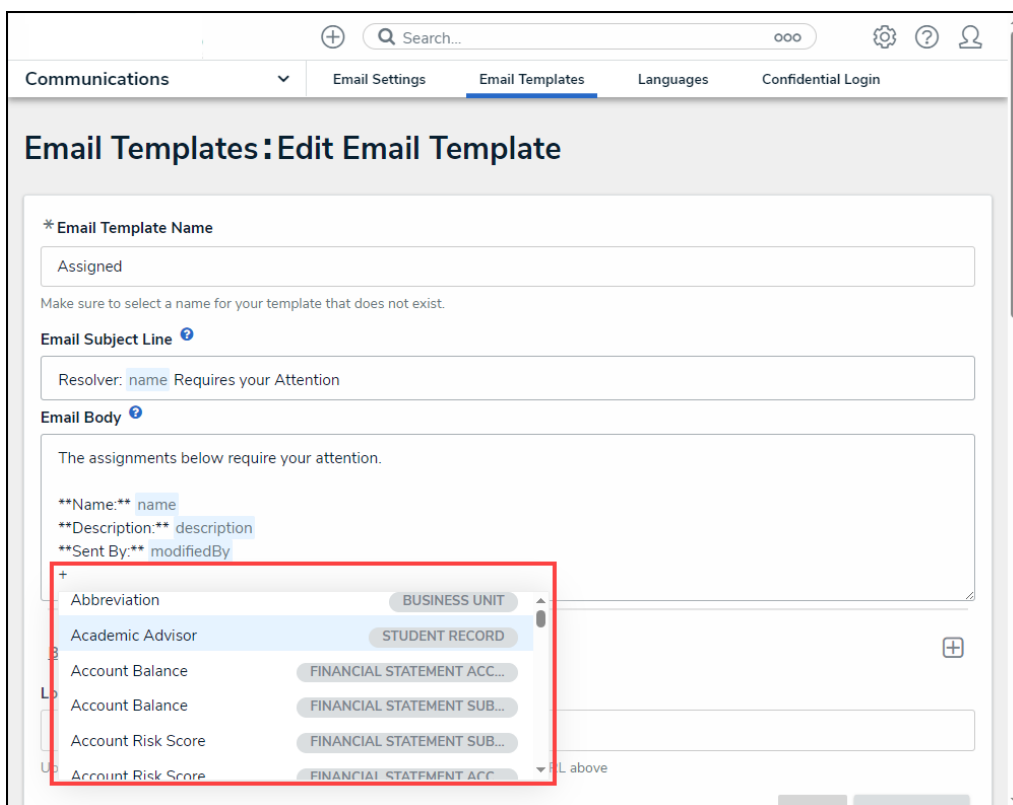
- Click the **Email Template** link you want to edit.



Email Template Link

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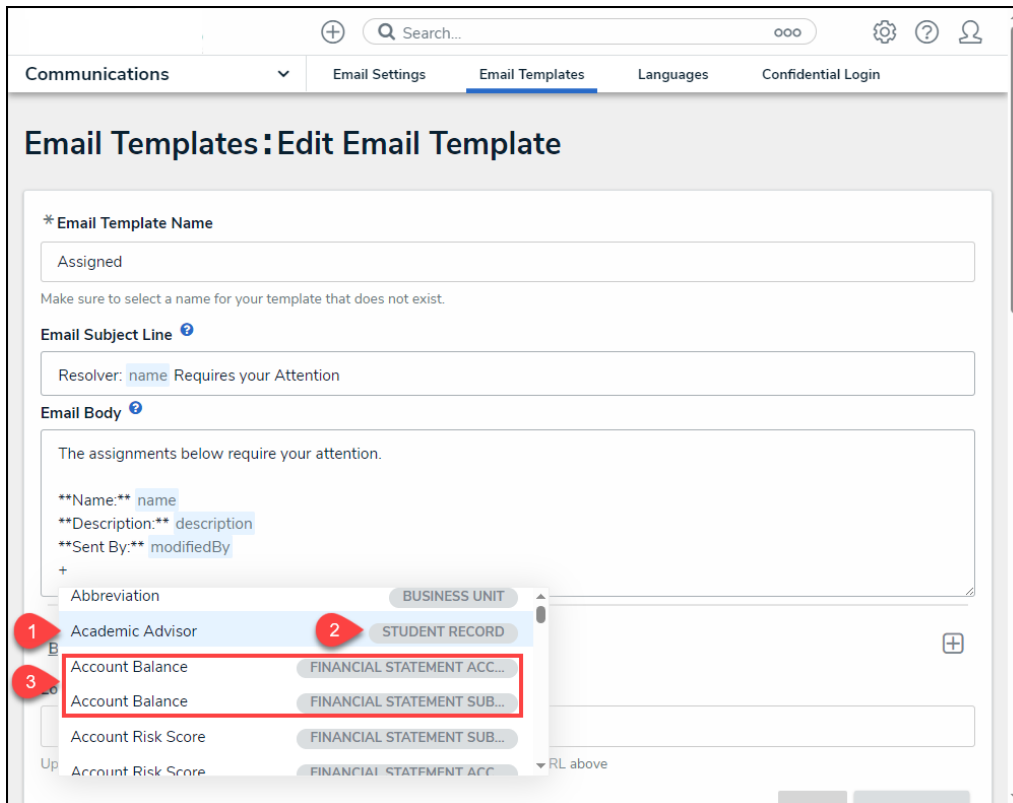
1. From the **Email Templates: Edit Email Templates** screen, type a + sign in the **Email Subject Line** or **Email Body** field.



+ Sign Dropdown

2. Type a field or property keyword after the + sign to narrow the variables list and select a **Variable** from the dropdown menu to insert it in the email template. The object type the field is linked to will appear in the search results to the right of the field's name. If a field is linked to more than one object type, it will appear in the search results once for each object

type.



Variables

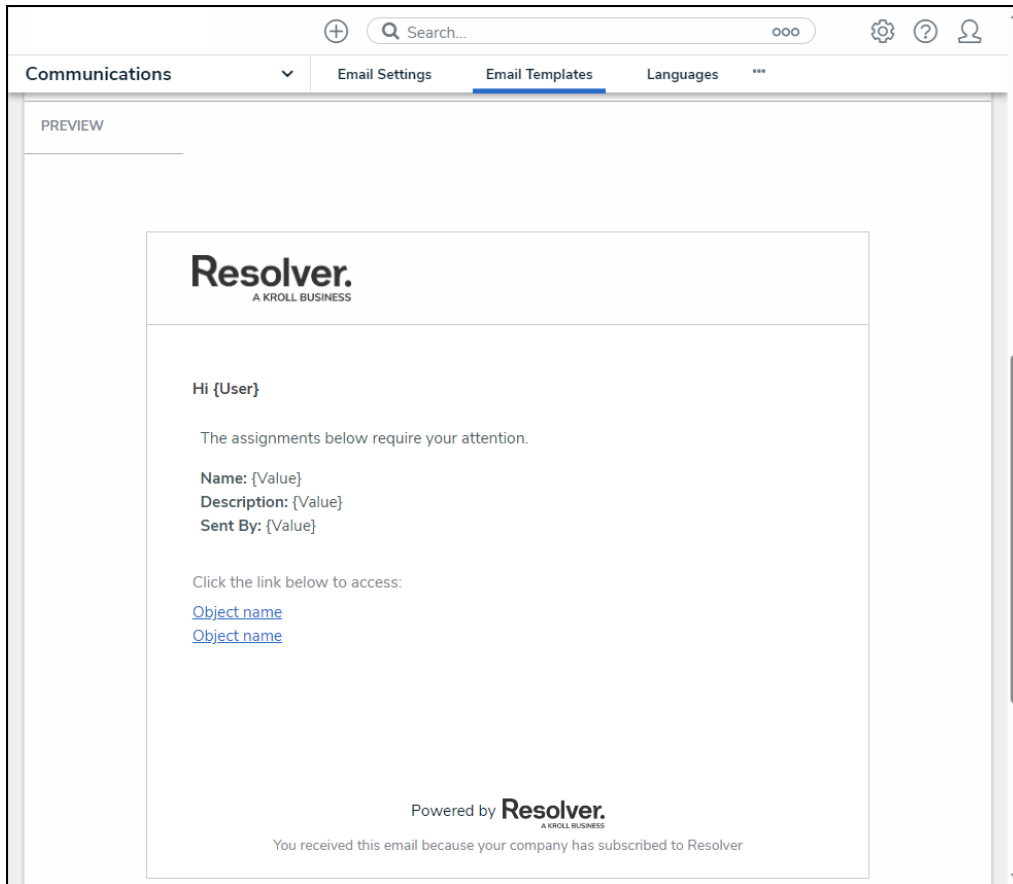
Number	Description
1	Variable Title
2	Object Type
3	One field that is linked to two different Object Types



Note:

Only the value of the field or property is displayed in the template. The field or property name is not populated automatically. You must manually type the title to include a title on the email template.

3. Scroll to the **Preview** section to see how the variables added to the email will appear on the email.



Preview Section

Supported Fields & Properties

A field or property will appear on an email as Not Specified if it is not linked to the same object type as the Message action, unlinked, or was deleted after embedding it in the template. Missing fields and properties will appear as {Field Not Found} in the **Preview** section.

The following fields and properties can be embedded in an email template:

- All field types **except** [Attachments](#), [Image Attachments](#) and [Rich Text](#).
- The following [properties](#):
 - **Name**
 - **Description**
 - **Unique ID**
 - **Created By**
 - **Created On**
 - **Modified By**
 - **Modified On**
 - **Submitter Properties**
 - **Submitter Name**

- **Submitter Email**