

# Creating a New Email Address

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## Overview

The Email Ingestion feature allows Administrators to create new email addresses to generate new objects and automatically map data from submitted emails to Object Fields. Administrators can also customize who is notified when submitters reply via email. To enable the Email Ingestion feature, an Administrator must create new email settings and Object Types.

## User Account Requirements

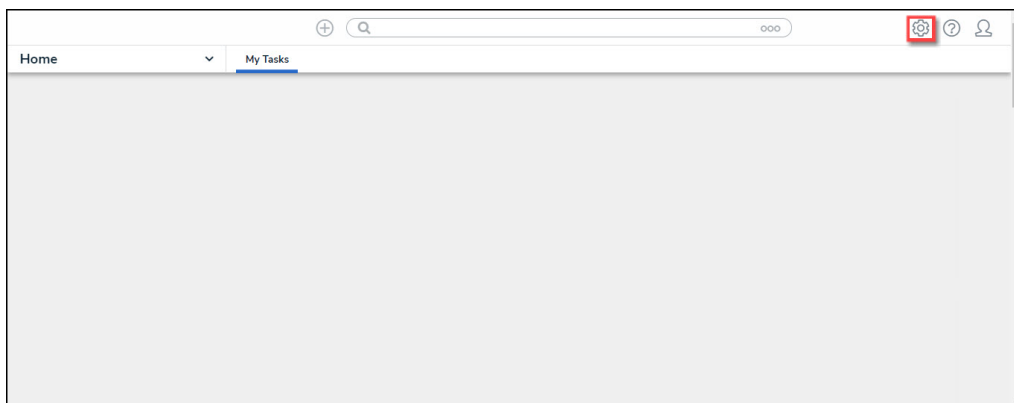
The user account you use to log into Resolver must have Administrator permission to access the **Email Settings** tile.

## Related Information/Setup

Please refer to the [Using Two-way Email](#) article for instructions for enabling that feature on an object type.

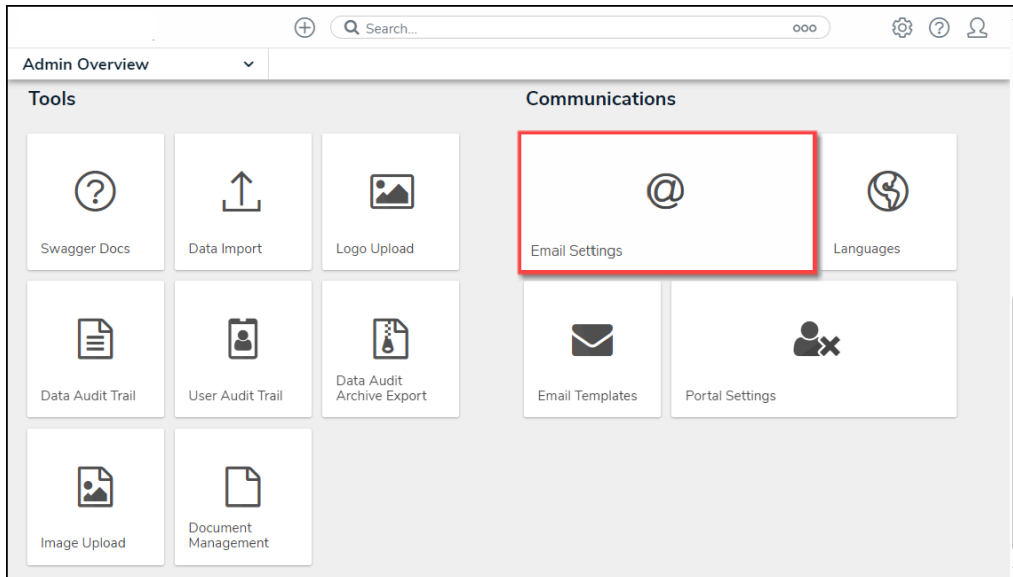
## Navigation

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



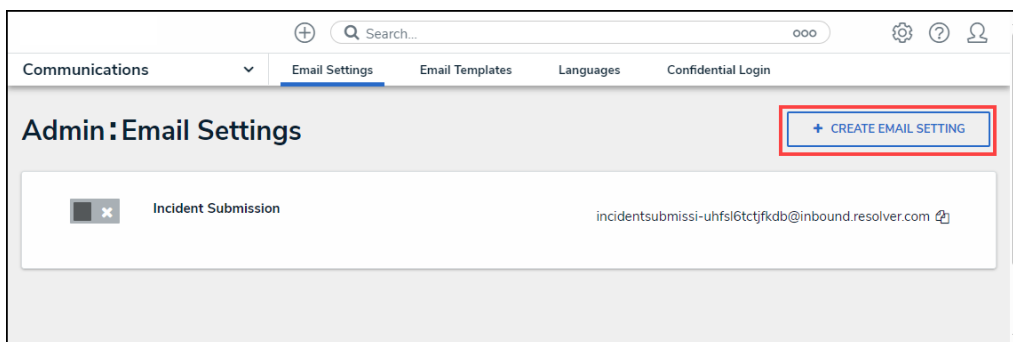
*Systems Icon*

2. From the **Admin: Overview** screen, click the **Email Settings** tile under the **Communication** section.



*Email Settings Tile*

3. From the **Admin: Email Settings** screen, click the **+ Create Email Settings** button.



*+ Create Email Settings Button*

## Creating a New Email Address

An email address can only be generated once an Administrator selects an Object Type, Workflow Trigger, Role and User Assignment. Entering information into these fields determines what type of object gets generated by this email address and what happens after creation.

1. From the **Admin: Email Settings** screen, Enter a **Name** to represent the New Email Settings in the **Name** field. The **Name** field has a maximum character limitation of 50 characters.

The screenshot shows the 'Admin: Email Settings' page for 'Incident Submission'. The 'Name' field is highlighted with a red box and contains the text 'Incident Submission'. Other fields include '\* Object Type', '\* Description', '\* Workflow Trigger', '\* Role', and '\* Auto Assign to', all of which are currently empty or have a search icon.

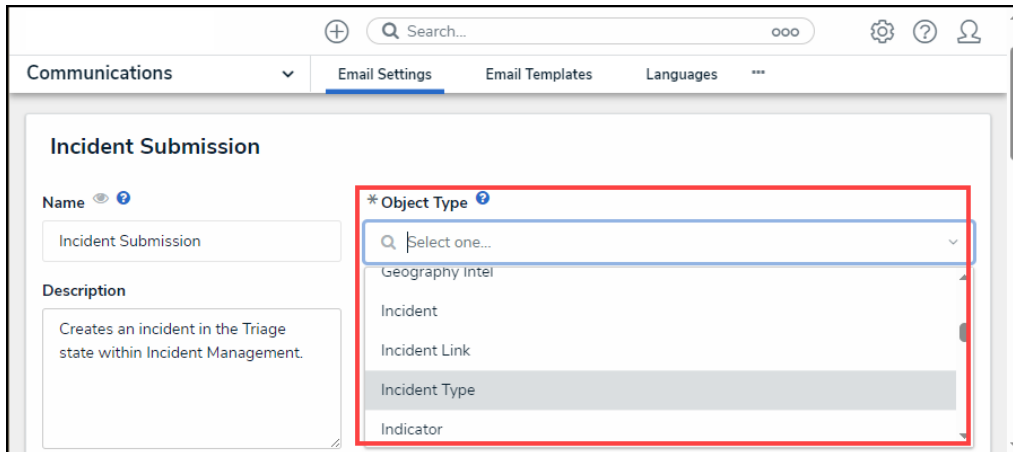
*Name Field*

2. **(Optional)** Enter a brief description outlining the email address's intended use, in the **Description** field.

The screenshot shows the 'Admin: Email Settings' page for 'Incident Submission'. The 'Description' field is highlighted with a red box and contains the text 'Creates an incident in the Triage state within Incident Management.' Other fields include '\* Object Type', '\* Workflow Trigger', '\* Role', and '\* Auto Assign to', all of which are currently empty or have a search icon.

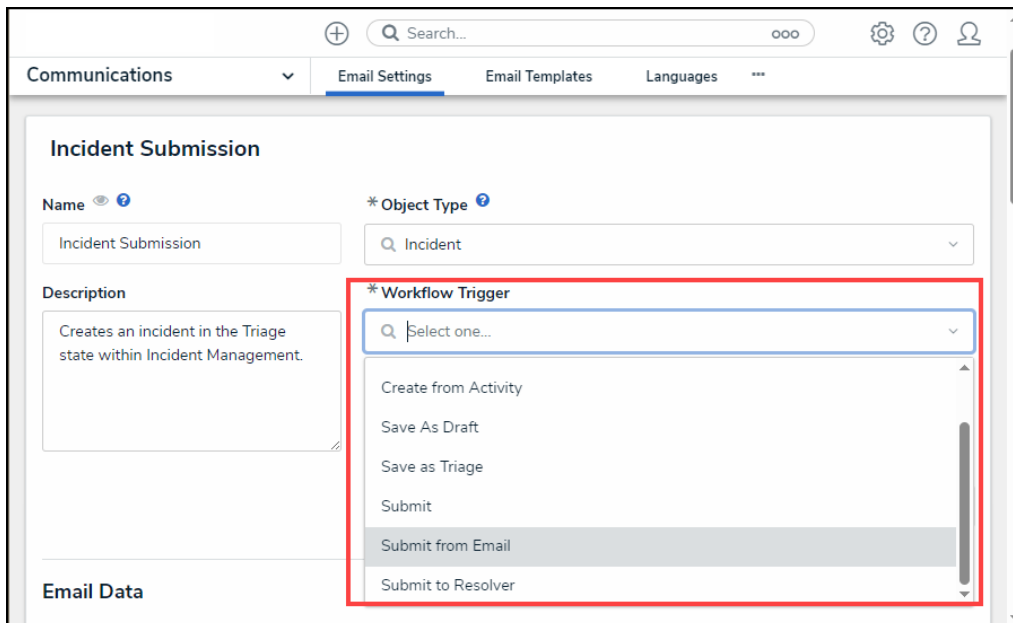
*Description Field*

3. Select an **Object Type** from the **Object Type** dropdown menu. The selected object type determines the type of object (e.g., activity, that is created by the email. You can edit the **Object Type** field after the email address is created. Selecting an object type will unlock the **Workflow Trigger**, **Role** fields, and the **Email Data** section.



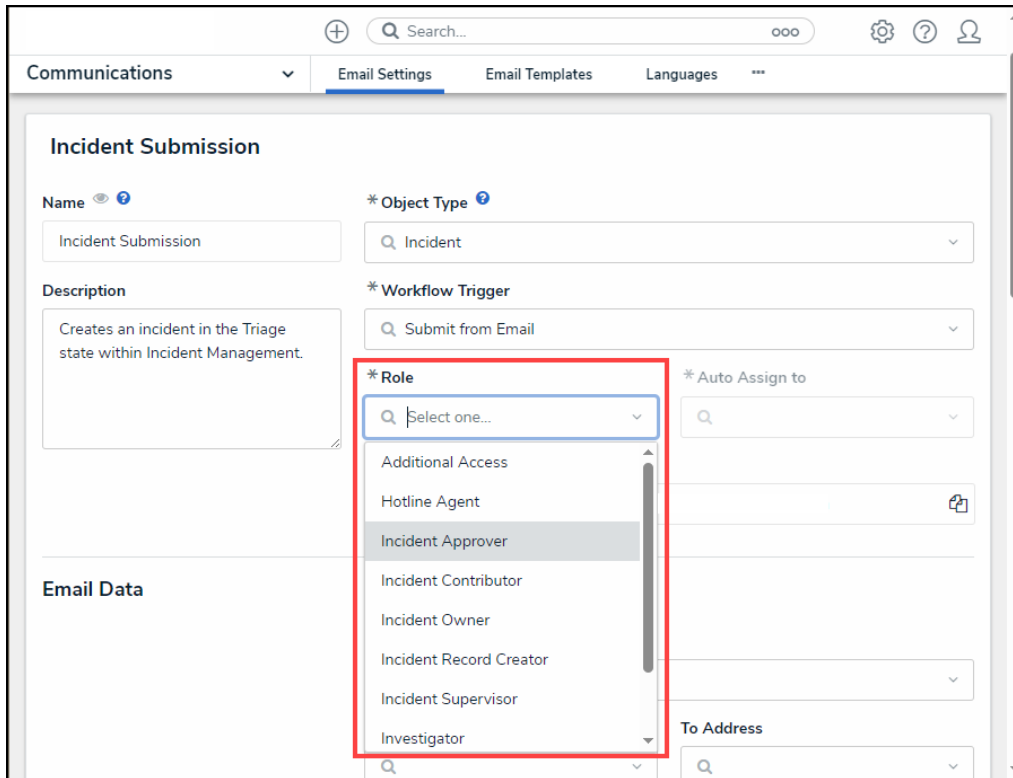
*Object Type Dropdown Menu*

4. Select a **Workflow Trigger** from the **Workflow Trigger** dropdown menu. The **Workflow Trigger** indicates at which Workflow State the email is generated (e.g., Submit, etc.).



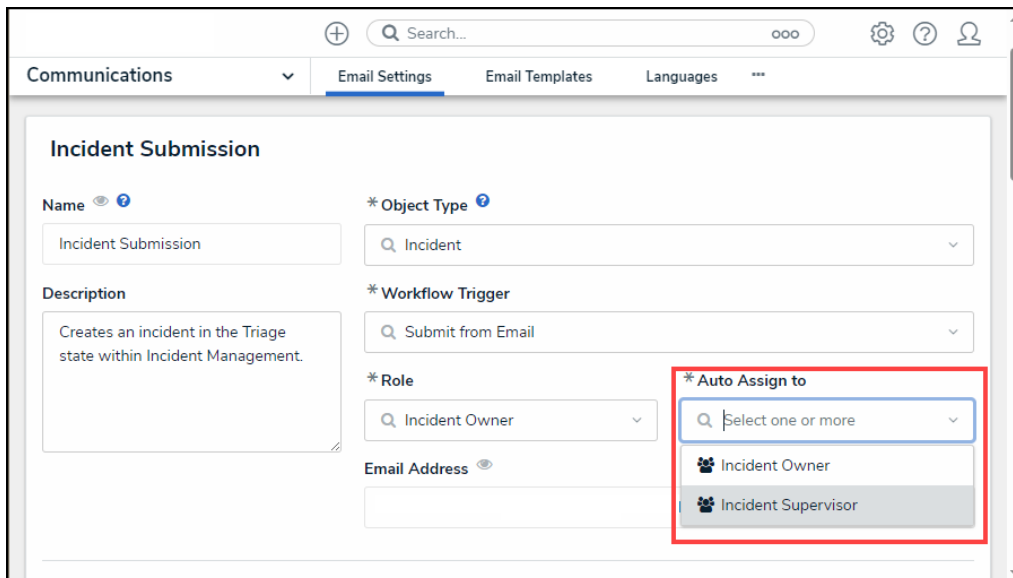
*Workflow Trigger Dropdown Menu*

4. Select a **Role** from the **Role** dropdown menu. The **Role** selected is assigned the object generated by the incoming email. The **Auto Assign to** field will unlock after a role is selected.



*Roles Field*

4. Select a **User** or **User Group** from the **Auto Assign to** dropdown menu. The selected User or User Group will be assigned to the created object. Objects can be assigned to multiple users or user groups.



*Auto Assign To Field*

7. Scroll to the **Email Data** section. The Email Data Section allows Administrators to map email data to applicable fields on the generated objects. The **Email Body** field is the only mandatory field which must be mapped.

8. **(Optional)** Select a **Sent Date** option from the **Sent Date** dropdown menu. The email will use the Send Date option as the date the email was sent (e.g., Expiry Date, Start Date, etc.).
9. **(Optional)** Select a **From Address** option from the **From Address** dropdown menu.
10. **(Optional)** Select a **To Address** option from the **To Address** dropdown menu.
11. Select an email body option from the **Body** dropdown menu. The body of the email will be created using information from the option selected.
12. **(Optional)** Select an email subject option from the **Subject** dropdown menu. The email subject field will be populated using the content from the selected Subject option.



**Warning:**

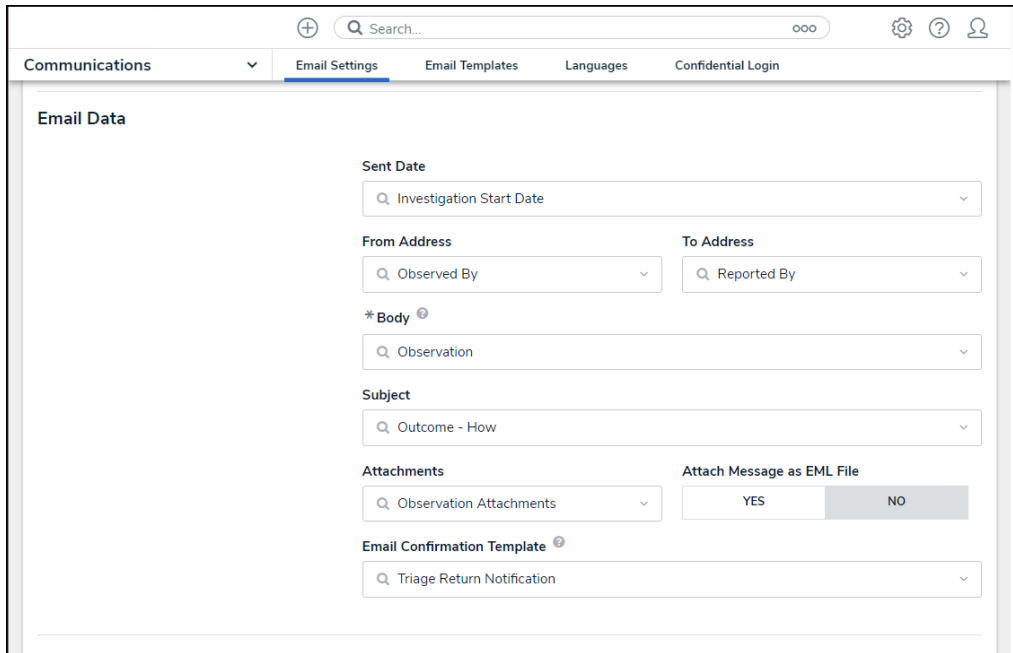
*Generating an email without mapping the email's **Body** and **Subject** will result in a blank Object, and the report content may not be saved.*

12. **(Optional)** Select an **Attachment** option from the **Attachment** dropdown menu to include the attachments within the email.
  - Observational Attachments
  - Outcome Attachments

**Attachment Restrictions:**

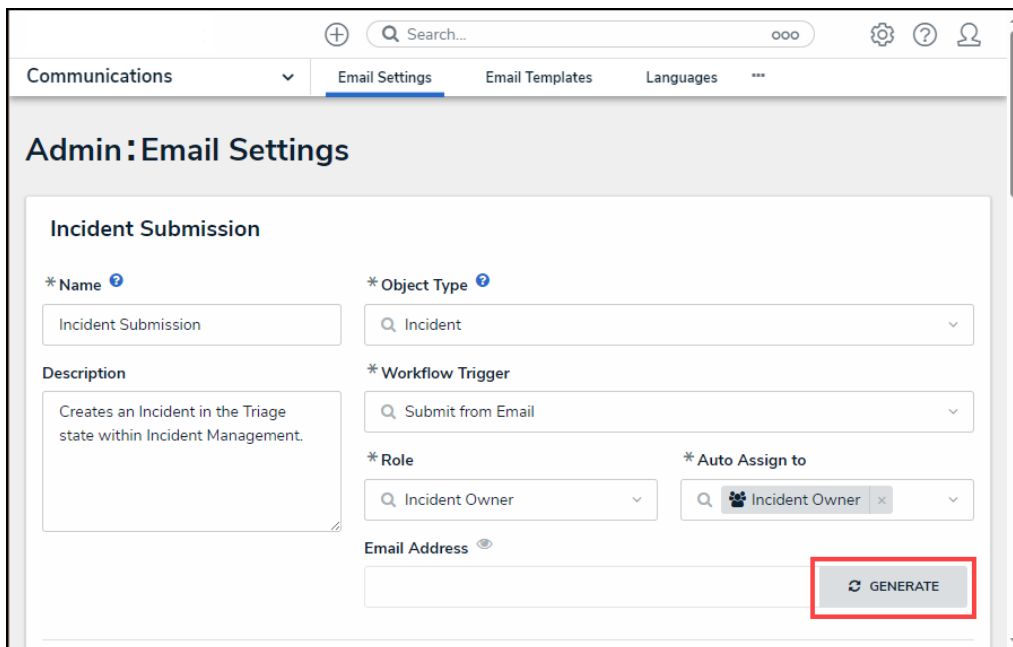
- *Only one attachment field can be used.*
- *An Organization can have a maximum of 100 email settings.*
- *Emails have a maximum of 30 MB, including all content, headers, attachments, etc.*
- *Emails can only be exchanged on an Object originated by email between Resolver Users <> Submitter.*
- *Attachment fields are the only fields that will continue to map values in subsequent Submitter replies.*

12. **(Optional)** Select the **Yes** button under the **Attach Message as EML File** to attach attachments to the email using the EML (Electronic Mail or Email) file extension that uses the Internal Message format protocol.
13. **(Optional)** Select an email template from the **Email Confirmation Template** dropdown menu. The Email Confirmation Template returns an automatic confirmation message back to the sender using the selected template.



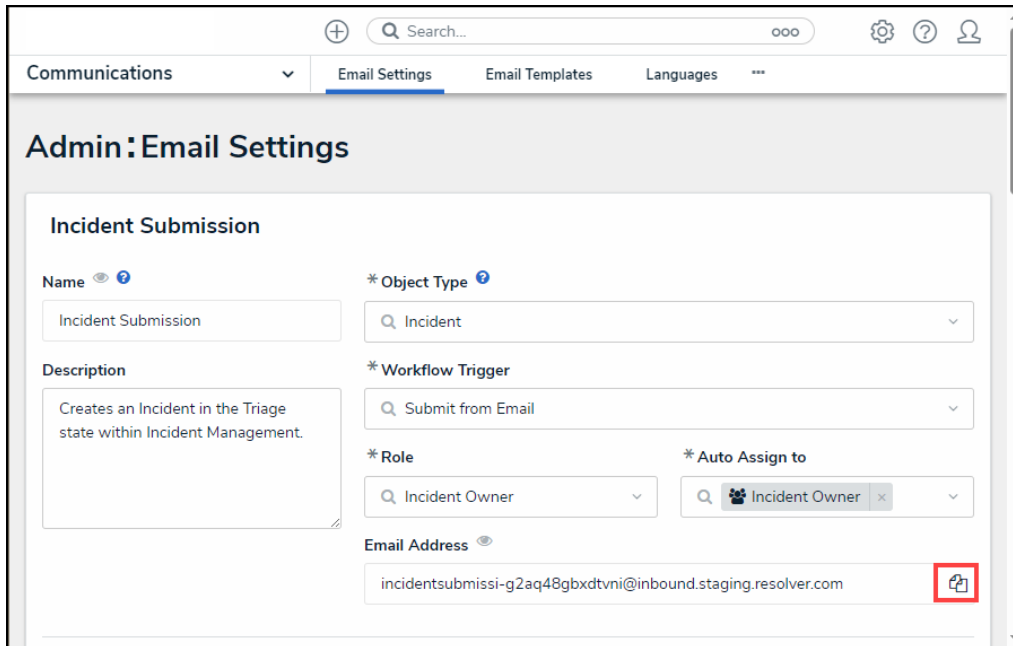
*Email Data Section*

15. Scroll to the **Email Settings** section and click the **Generate** button to generate a system-assigned email address. The system-generated email address cannot be edited. The email will be created using the **Name** field value and a unique 16-character string of random alphanumeric values.



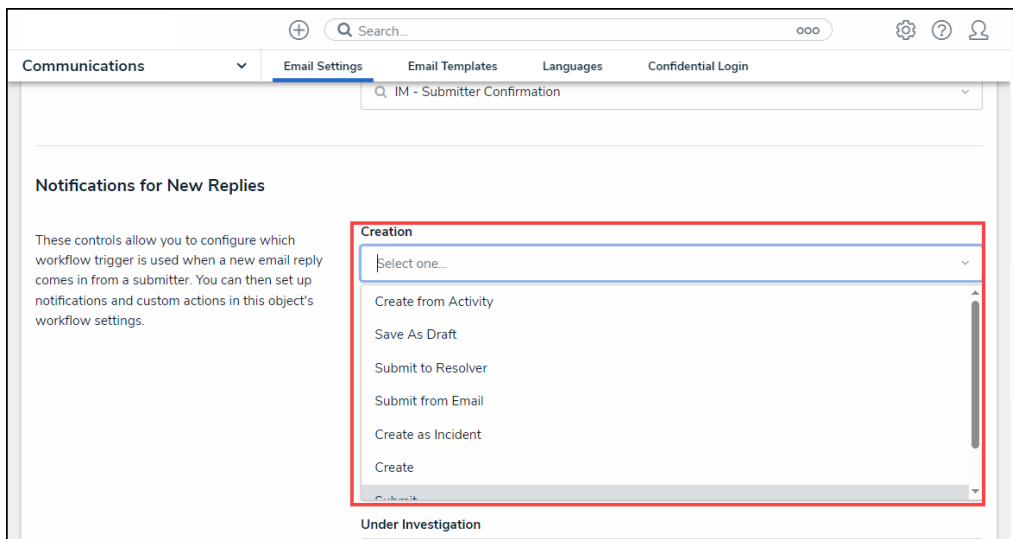
*Generate Button*

16. After the email address is generated, the **Generate** button will become a **Copy** button, allowing Users to copy the email address to the PC clipboard.



*Copy Button*

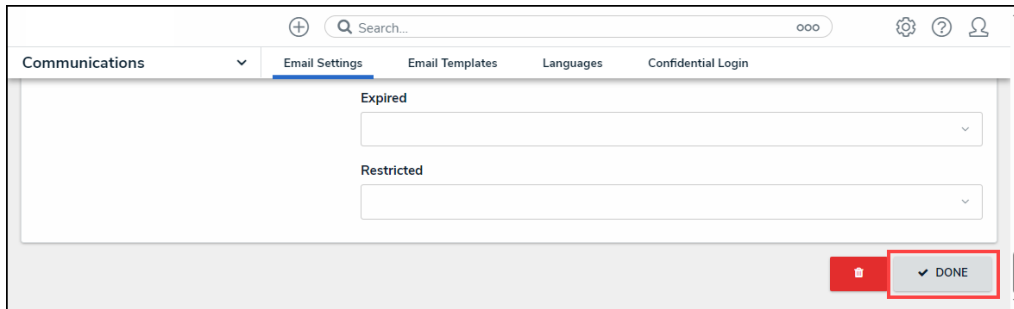
17. Scroll to the **Notification for New Replies** section to customize a state's action and indicate which workflow trigger is initiated based on email replies from a Submitter. The **State** fields on the **Notification for New Replies** section will differ based on the object type selected in the **Object Type** field.
18. Click on a **State** field and select an action for the state from the dropdown menu.



*State Field Dropdown Menu*

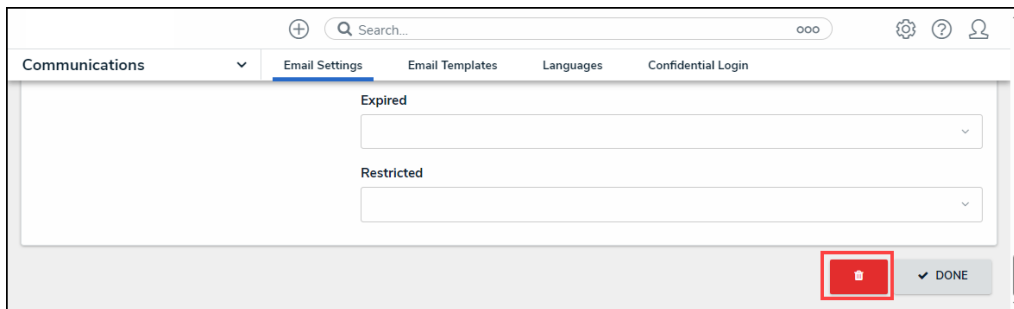
19. When you are finished adding actions to states, click the **Done** button to save your changes and return to the previous screen.





*Done Button*

20. **(Caution)** Click the **Delete** button to delete the email settings. Deleting an email setting prevents further communications between the email submitter and an Administrator. Resolver recommends never deleting an email setting once it's in use. For additional guidance, please contact [Resolver Support](#).



*Delete Button*