Create an Email Setting

Last Modified on 06/16/2022 2:44 pm EDT

A helpful function within Resolver Core is its ability to link data together to show more meaningful connections within new information. Thanks to the email ingestion feature:

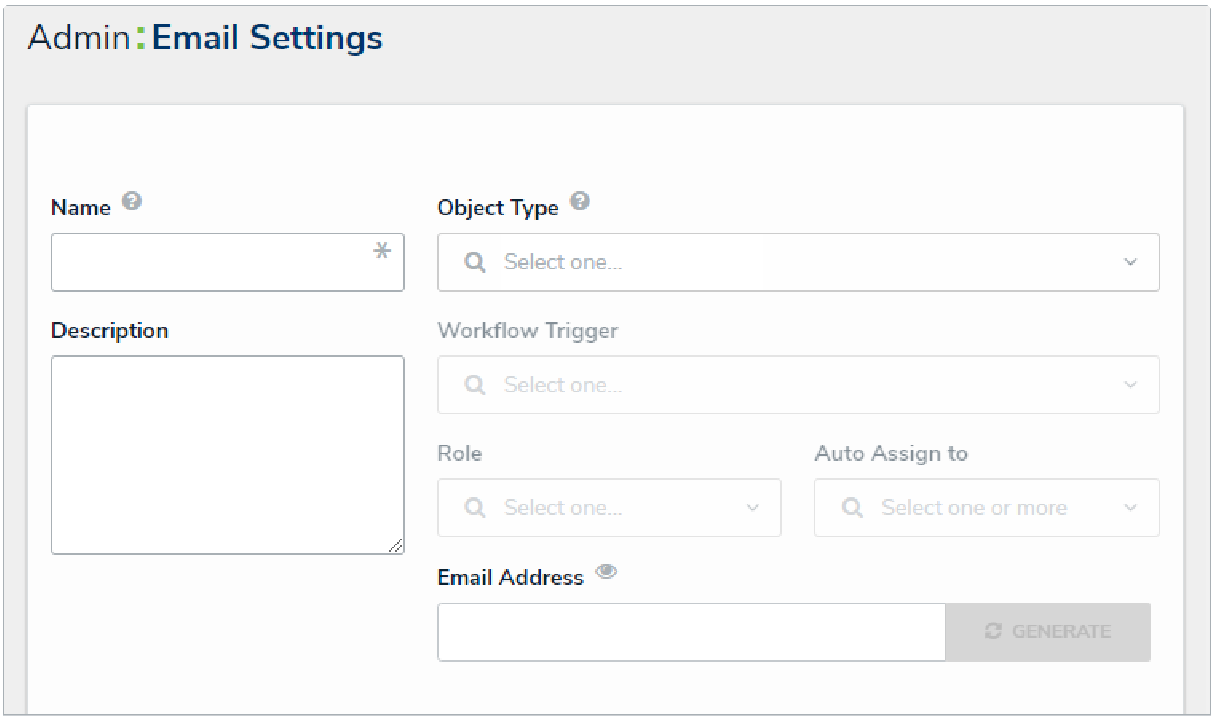
- Core admins can create new email addresses to generate new objects and automatically map data from submitted emails to fields on those new objects.
- Admins can customize who's notified when submitters reply via email. So, teams can resolve cases faster – without having to switch between their email inboxes and system tasks.

This article covers how admins enable the email ingestion feature within their own systems, by creating new email settings and object types. Check out the Using Two-way Email article for instructions for enabling that feature on an object type.

This system-generated email address cannot be customized, but internal email address accounts can be customized to forward to this inbox. For example, setting up **newincident@yourcompany.com** to automatically forward messages to **newincident-kgzrd6lmucl7t5tn@inbound.staging.resolver.com**.

To create a new email setting:

1. Click the icon in the top bar **Communications** > **Email Settings** panel.
2. Click **+ Create Email Setting** to open the **Admin: Email Settings** screen.



The Email Settings screen.

3. **Name:** Enter the email address' name (e.g., Incident Follow Up). Note: Name limit is 50 characters.

> The email address name cannot be changed once it has been generated by the system. Your account is eligible for a maximum of 100 individual system-generated email addresses. However, deleting email settings isn't recommended. If you require more than 100 individual system-generated email addresses, contact Resolver Support for further assistance.

4. **Optional:** Enter a description of the email address in the **Description** field.

5. **Object Type**: Select the object type (e.g., Incident) that you want the email address to create. Note: This field is mandatory to assign an email to the object type (otherwise the object will be blank).

    - For example, if selecting the Incident object, go to the Incident form, where you'll enable the two-way email UI.

    > You can change the object type and any of the related fields after the email address has been generated.

6. **Workflow Trigger**: Select the Create workflow trigger you wish to enact on the object. Note: After the email is generated, it assigns the state that message transitions to next.

7. **Role**: Select the role (e.g., Incident Owner) the newly created object will be assigned to.

8. **Auto Assign to**: Select the **User** (e.g., Incident Supervisor) or **User Group** the newly created

object will be assigned to. Note: Objects can be assigned to multiple users or user groups.

9. **Email Address**: Once you've entered the body text (see Step 10), you can return to this field and click the **GENERATE** button to create a unique system generated email address that uses the **Name** field value, plus a unique 16-character string of random alphanumeric values (added for security reasons).

    a. Click the **COPY** button to copy the email address to your clipboard and save/share elsewhere.

10. In the **Email Data** section, you can map the:

    a. Optional field: **Sent Date** (e.g., Today).

    b. Optional field: **From Address** (e.g., Observed By).

    c. Optional field: **To Address** (e.g., Reported By). Note: To Address data can be mapped to multiple fields.

    d. Mandatory field: **Body** (e.g., Observation). Once you've completed this field, you can click GENERATE next to the Email Address field above (see Step 9).

    > Generating an email without first mapping said email's body or subject (see below screengrab) will result in the object being blank. Then the submitter's report content may not save and then go missing – so make sure you map the email body and subject to a field!

    e. Mandatory field: **Subject** (e.g., Outcome - How).

    f. Optional field: **Attachment** (e.g., Observation Attachments) - This field enables subsequent replies and if you attach a file it will continue to map into this field.

    > Attachment field restrictions include:
    >
    > - Only one attachment field can be used.
    > - Maximum 100 email settings per org.
    > - Maximum 30MB total email size, including all content, headers, attachments, etc.
    > - Emails can only be exchanged on an object originated by email between Core Users <> Submitter.
    > - Attachment fields are the only field that will continue to map values in subsequent Submitter replies.

    g. Optional field: **Attach Message as EML File** - Click YES to enable users to attach email files (e.g., an Outlook thread about the Incident) as part of their submission. Note: The default option here is NO.

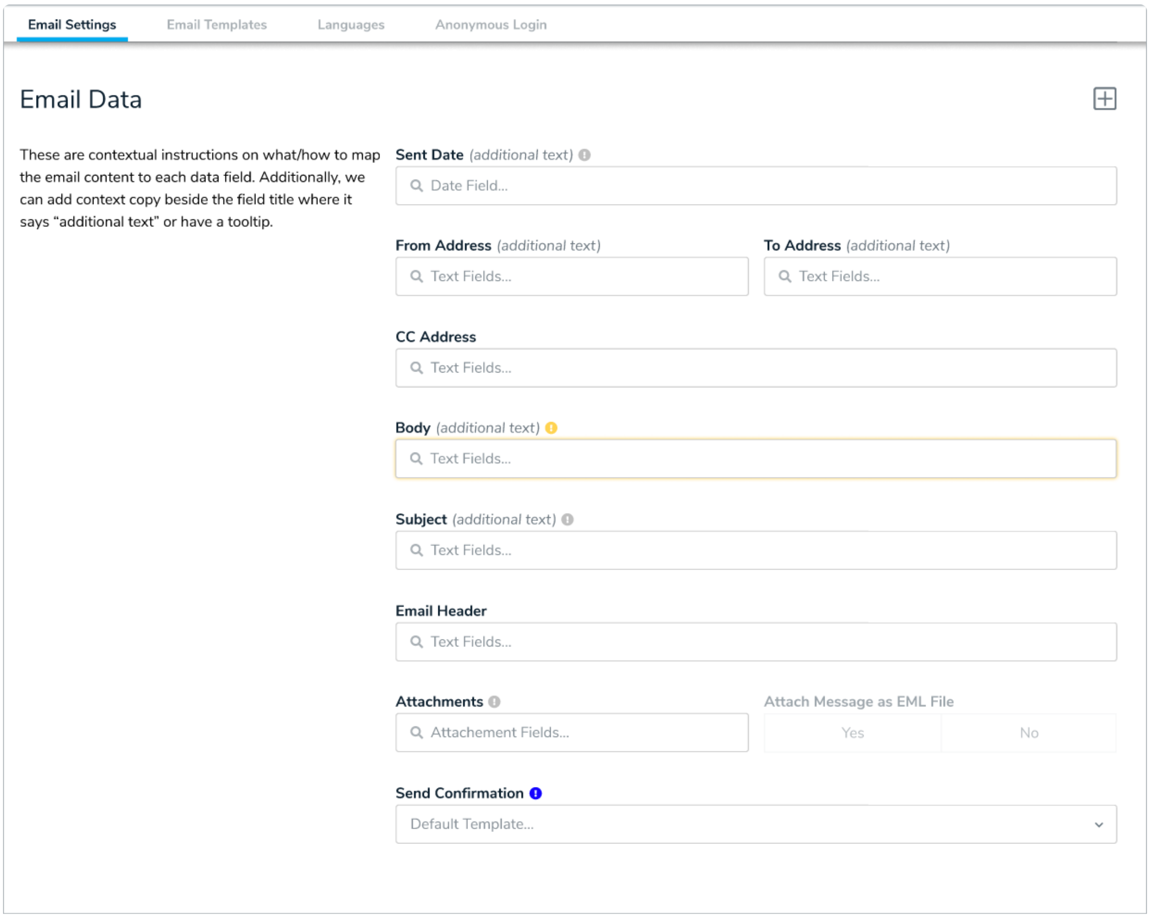
h. Optional field: **Email Confirmation Template** - Select which email template (e.g., Incident Open Notification) to notify the Submitter with. This field can be left blank if you don't wish to send a confirmation email.

> The controls in the Notifications for New Replies section, allow you to configure which workflow trigger is used when a new email reply comes in from a Submitter. You can then set up notifications and custom actions in this object's workflow settings.

11. **Optional:** In the **Notifications for New Replies** section, you can configure which workflow trigger is used when a new email reply comes in from a Submitter. You can then set up notifications and custom actions in this object's workflow settings.

    a. Select a new Workflow state trigger (e.g., Create, Draft, Triage, Open) to transition each time the Submitter sends a new reply. Doing so helps you to control who gets what message.

> There is an option to create custom confirmation messages in the system, after you've used or created a custom email template. To do so, you need to insert variables (fields or properties) in the subject and body for getting additional details about the object(s).
>
> This option is helpful for custom confirmation messages – BUT if you don't add a + sign before it, you won't be able to insert the field values!



The Email Data Section.

b. If you haven't already done so (see step 9), click GENERATE in the first section to create an email address.

c. Click Done.

Disabing email settings will prevent any further communications between the email submitter and Core Admin. Resolver highly recommends you never delete an email setting once it's in-use. For further guidance, please contact Resolver Support.