

Email Templates

Last Modified on 02/11/2022 10:19 pm AEDT

In this article:

- Overview
- Configuring an email template
- Email template components
- Variables
- Images
- Subject
- Email body
- Header
- Footer
- Using Email Templates

Overview

Sending emails as part of workflows is very useful and widely used feature in ReadiNow. The Email Templates feature provides a central place to define and manage the content and style of emails. I.e. define the content of the email once (with variables) and then use it in multiple 'Send Email Workflow' Activities.

Most emails will have common elements like headers and footers that can be defined and managed separately.

Configuring an email template

To define an email template:

- Select **Administration** from the Application Menu.
- Select **Email Templates**, located under the **Email** section.
- Select **+NEW** to show the Email Template form.
- Complete the following details
 - **Name** - the name you want to give this Email template
 - **Description** - any additional description for the Email template
 - **Application** - select the application you want
 - **Variables** - variables can be used to refer to some information that can be used in expressions (see Variables section below for more information)
 - **Images** - images can be used in email body (see Images section below for more information)
 - **Subject** - the subject line for the email. This can be static text or combination of text or expression using variables (see Subject section below for more information)
 - **Body** - the body of the email. This can be static text or combination of text, images, expression using variables (see Body section below for more information)
 - **Header** - select a header (see Header section below for more information)

- **Footer** - select a footer (see Footer section below for more information)

Name	Last modified date	Last modified by	Used in workflows	Application
Incident approval	10/10/2022	.admin	1	Incident Management

Email template components

Following are the main components of an email template:

- General details - name, description, application
- Variables
- Images
- Subject
- Body
- Header
- Footer

Variables

Emails are sent using workflows. Sometimes the information that is to be included in the email, is only accessible during the workflow run. To access this information, variables can be defined in the email template and the value of these variables can be set in the workflow.

In the Email template form image above, a link to the given incident is to be included in the email body. This link is generated during the workflow run.

To make this work, a text variable 'IncidentLink' is defined in the email template. And the value of this variable is set in the workflow.

Value of 'IncidentLink' variable defined in the email template is set here

Setting the variable value in workflow

Images

Images can be included in the email body. New images can be uploaded or existing images that are already uploaded in REDINow can be used.

Images can be referenced in email body with syntax '%ImageName%' (not including the file extension).

For example if the name of image is 'Water contamination', the syntax to use the image in body would be '%Water contamination%'

Only the images selected for the email template can be referenced in email body.

Click to upload new image

Click to select existing image

Water contamination

Adding an image to the template

Subject

Subject can include a combination of text, variables, functions.

Subject 

```
'Incident approval for: ' + [IncidentName] + [IncidentApprover].[Last name]
```

Subject field

Email body


Email body can include a combination of text, variables, functions, images.

Email body 

```
'Dear ' + [IncidentApprover].[Name] + ',' + '<br><br>' +  
'An incident has been submitted for approval.<br>' +  
'Please click the following link to view the incident details: ' + [IncidentLink] +  
'<br><br>Incident photo:<br>' + '%%Water contamination%%'
```

Email body field







Both subject and email body fields can be edited in expression editor by clicking on popup icon available on top right corner of the field.

Email body 1  —click this icon to open up expression builder

```
'Dear ' + [IncidentApprover].[Name] + ',' + '<br><br>' +  
'An incident has been submitted for approval.<br>' +  
'Please click the following link to view the incident details: ' + [IncidentLink] +  
'<br><br>Incident photo:<br>' + '%%Water contamination%%'
```

Body expression

image functions snippets variables

      2

```
1 'Dear ' + [IncidentApprover].[Name] + ',' + '<br><br>' +  
2 'An incident has been submitted for approval.<br>' +  
3 'Please click the following link to view the incident details: ' + [IncidentLink] +  
4 '<br><br>Incident photo:<br>' + '%%Water contamination%%'
```

Cancel **Apply**

Expression builder

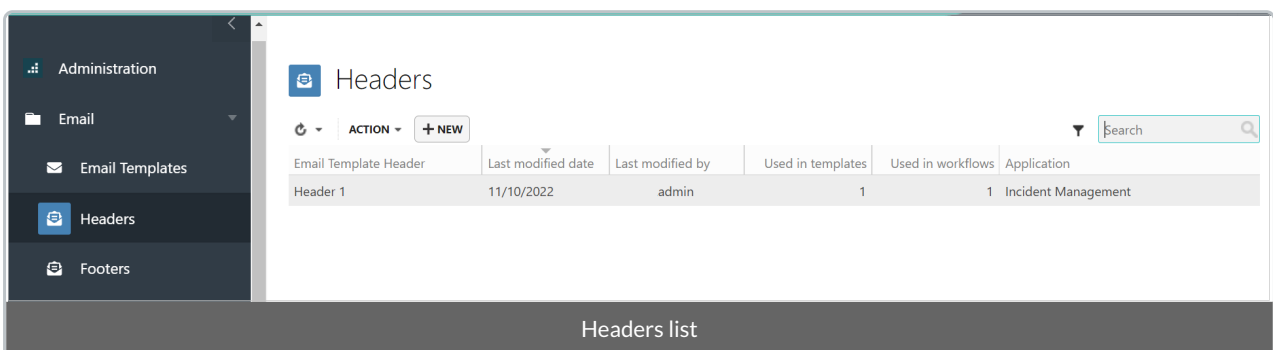
Header

A header is an optional element that can be used in an email template. In a typical case, a header may contain a company logo and some static information and links etc. that is to be displayed at the top of the email.

A header can be used in multiple email templates that require the same information.

To define a header:

- Select **Administration** from the Application Menu.
- Select **Headers**, located under the **Email** section.
- Select **+NEW** to show the Header form.
- Complete the following details
 - **Name** - the name you want to give this Header
 - **Description** - any additional description for this Header
 - **Application** - select an application
 - **Images** - upload new images or select existing images (see Images section above for more details)
 - **Header contents** - header for the email. It can be static text or combination of formatted text, images, web links.



← Back Discard Save

Edit header*

Name
Header 1

Description

Application
Incident Management x v
Selected Application is used for packaging and deployment

Header contents 1 Steps to insert an image 🔗

B I U 🖼️ 🔗 ☰ ☰ ” ✂️ ☰ ☰ ☰ ↺

2 ReadiNow ReadiNow

3 Insert image Cancel

Header form

Footer

A footer is an optional element that can be used in an email template. In a typical case, a footer may contain images, some static information and links etc. that is to be displayed at the bottom of the email.

A footer can be used in multiple email templates that require the same information.

To define a footer:

- Select **Administration** from the Application Menu.
- Select **Footers**, located under the **Email** section.
- Select **+NEW** to show the Footer form.
- Complete the following details
 - **Name** - the name you want to give this Footer
 - **Description** - any additional description for this Footer
 - **Application** - select an application
 - **Images** - upload new images or select existing images (see Images section above for more details)
 - **Footer contents** - footer for the email. It can be static text or combination of formatted text, images, web links.

Email Template Footer	Last modified date	Last modified by	Used in templates	Used in workflows	Application
Footer 1	11/10/2022 2:26 pm	anurag.admin	1	1	Incident Management

Footers list

← Back
Discard Save

Edit footer

Name


Description

Application

Selected Application is used for packaging and deployment

Footer contents

***Disclaimer:** This email and any file attached are intended solely for the use of the individual or entity to whom they are addressed. If you receive this email by mistake, please notify the author and do not make any use of the email.*



Images + Add new

Apple

✎
🗑

Car

✎
🗑

Using Email Templates

An email can be sent using Send Email Activity in workflows. Send Email activity can now use Email Template to send email. See [SEND EMAIL ACTIVITY](#) for more information.