

# Email Settings

Members with the appropriate permissions have the ability to customise the formatting of email notifications.

## Customising your Emails

1. Navigate to the **'Settings'** item in the main menu
2. The **'Options'** tab should be open by default
3. Scroll down until you see the form items below:

Email Subject

Email Header

Email Body

Email Footer

[RESTORE EMAIL DEFAULTS](#) [TEST EMAIL FORMAT](#) [SAVE EMAIL FORMAT](#)

## Text Boxes Explained

The Subject and Body of the email may be customised. These text boxes will not save empty values. The Email Header, Body and Footer text boxes make up the body of the email.



**Please Note:** If the text boxes (above) are blank, it means that the Default Email Template is currently in use.

Select **'Restore Email Defaults'** to populate the Default Email Template Settings into the text boxes and **'Save Email Format'** - this will save the Default Email Format as your existing Email Template.

## STANDARD Field AND SECTION MARKERs EXPLAINED

STANDARD FIELD and SECTION Markers are used within the Email Template to mark the position that the live data is to be inserted.

Select **'Restore Email Defaults'** to display the Standard Fields that are available. (Note: Do not select SAVE EMAIL FORMAT until you have finished formatting your email template)

### Standard Fields

The Standard Fields are enclosed with **#{ }#**.

**For example:** #{SampleStandardFieldName}#

### Section Markers

The data within the **'Email Body'** text box is grouped into Crew, Shift and Job.

Place the relevant Section Marker before and after the Standard Fields within that Section to display the data correctly. These Sections Markers are enclosed with **{{ }}**.

**For example:** {{SAMPLE\_SECTION}}

## STANDARD FIELD AND SECTION MARKERS

| Section Marker (required before and after the Field Marker if included in the Email Body) | Field Marker | Description |
|---|--------------|-------------|
|---|--------------|-------------|

|                    |                          |                             |
|--------------------|--------------------------|-----------------------------|
|                    | #{Name}#                 | Job Name                    |
|                    | #{AllocatedContactName}# | Job Allocation Contact      |
| {{CREW_TEMPLATE}}  | #{CrewName}#             | Crew Name                   |
| {{CREW_TEMPLATE}}  | #{CrewLeader}#           | Crew Leader                 |
| {{CREW_TEMPLATE}}  | #{ContactPhone}#         | Crew Mobile Number          |
| {{SHIFT_TEMPLATE}} | #{CrewShiftStartTime}#   | Start Time                  |
| {{SHIFT_TEMPLATE}} | #{StartOn_Date}#         | Start Date                  |
| {{JOB_PROPERTIES}} | #{Code}#                 | Job Code                    |
| {{JOB_PROPERTIES}} | #{Name}#                 | Job Name                    |
| {{JOB_PROPERTIES}} | #{Focus}#                | Job Allocation Focus        |
| {{JOB_PROPERTIES}} | #{Location}#             | Job Allocation Location     |
| {{JOB_PROPERTIES}} | #{Types}#                | Job Allocation Types        |
| {{JOB_PROPERTIES}} | #{Objectives}#           | Job Allocation Objectives   |
| {{JOB_PROPERTIES}} | #{ContactName}#          | Job Allocation Contact Name |
| {{JOB_PROPERTIES}} | #{WorkUnit}#             | Job Allocation Work Unit    |

## Test your Email FORMAT

After making the required adjustments to the text, spacing and field order, you'll want to test your email:

1. Select **Test Email Format** to view your changes
2. If your Test Email has not worked as planned, save any required changes to a Notepad file and select **Restore Email Defaults** to return to the default email format.
3. After you are happy with your changes, select **Save Email Format**.

The new Email format has now been updated to the database. See it in action by selecting the '**Email**' menu option when Right-Clicking a Job from within the Job Board. This email option is only available on current or future job allocations.

Other users will need to Logout and back in again to have access to the updated Email format.

Your current Email format will be displayed in the Email Text Boxes when you return to **Administration - Settings - Options**.