

Implementing Outbound Email

This article discusses best practices for implementing outbound email. Outbound email is used for reminders and notifications about record state changes, such as support case updates or contract renewal notifications. Routine emails can be sent by the system automatically, or users can manually send emails from the system.

This discussion can help you understand your outbound email options so you can make informed design decisions. For more information about configuring email in Agiloft, please see our [email training](#) or our [email documentation](#).

Typical Use Cases

Agiloft includes many options for sending emails. Administrators can control and protect record information by providing appropriate options for automatic and user-customized email.

Automated: When a record is created or updated in Agiloft, the system can send an automatic outbound email that includes a pre-defined recipient, subject, and message body containing data from the record. Automatic emails are triggered by two kinds of rules: scheduled or time-based, and conditional rules which run because of changes made to a record.

Example

- When the Status of an approval changes to Pending Approval, send a request for approval to the Approval Team or the Approver.
- When a new helpdesk case is created, notify the Assigned Person or Assigned Team.

Partially automated: A partially automated outbound email process offers more flexibility and control. For example, you might want to allow power users to send a predefined message to a new recipient, but not allow them to attach a document to that pre-defined message. By using partial automation, the administrator retains control of the quality of company communication, but gives staff enough flexibility to send messages without special permissions or help.

Example

- When contract administrators want to communicate with a separate party regarding a contract, allow them to write a custom message, but filter available recipients to contacts of the other party.
- When a staff member wants to communicate with specific recipient groups, allow them to use pre-defined templates to populate a message body.

Free form: The user is given permission to compose a unique message not based on a template.

Automated Email Notifications

Automated emails are sent by rules in response to record edits or at scheduled intervals. Since this method doesn't require user interaction, it is most useful when the email doesn't need to be customized. For instance:

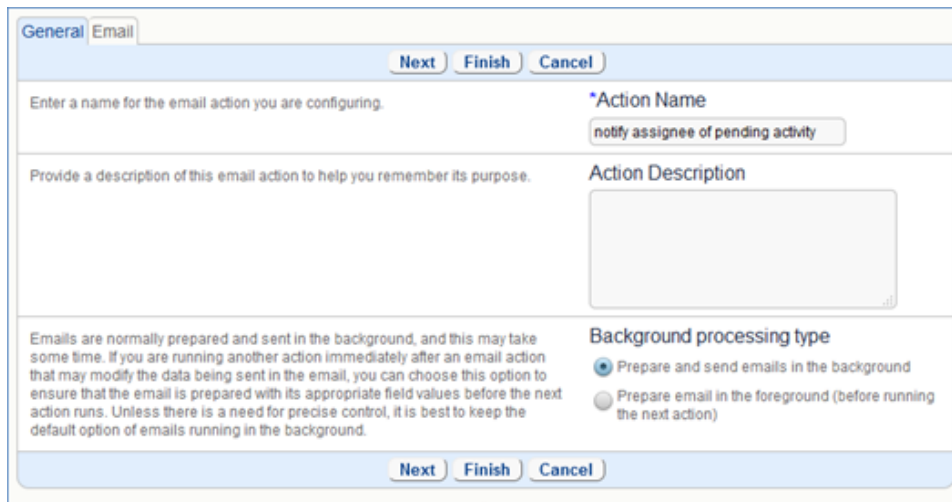
- Record inactivity reminders, SLA compliance notifications, and due date reminders.
- Completion, expiration, publishing, and other status-based notifications.
- Assignment, reassignment, and update emails.

Rules and actions can be configured precisely based on the business and user requirements. Consider how to identify the recipient and any CCs, what information should be included in the body, and how the system will respond to edge cases when designing email rules.

Send Emails with a Rule

To view, edit, or create email actions related to a rule...

1. Navigate to **Setup [Table] > Rules** and edit an existing rule or create a new one.
2. Give the rule a name and conditions. These vary depending on the table and rule purpose.
3. On the Action tab, click Create Email Action.

The screenshot shows a web-based configuration window titled "Email" with a "General" tab selected. At the top, there are "Next", "Finish", and "Cancel" buttons. The main area is divided into three sections. The first section, "Enter a name for the email action you are configuring.", contains a text input field labeled "*Action Name" with the value "notify assignee of pending activity". The second section, "Provide a description of this email action to help you remember its purpose.", contains a large text area labeled "Action Description". The third section, "Emails are normally prepared and sent in the background, and this may take some time. If you are running another action immediately after an email action that may modify the data being sent in the email, you can choose this option to ensure that the email is prepared with its appropriate field values before the next action runs. Unless there is a need for precise control, it is best to keep the default option of emails running in the background.", contains a "Background processing type" section with two radio button options: "Prepare and send emails in the background" (which is selected) and "Prepare email in the foreground (before running the next action)". At the bottom, there are "Next", "Finish", and "Cancel" buttons.

Email action wizard

4. On the General tab, give the action a name and description.

- The Email tab contains all preexisting templates. Choose an existing template or create a new email to send when the rule runs.

Email wizard

To manage or create email templates...

- Navigate to **Setup > Email**.
- Under Email templates click Go to Rule/Workflow Emails.
- Select the table where the email will be sent from and click Next. From this wizard you can create, copy, or delete all email templates that are used in actions and exist in the selected table.

Edit	ID	TO user fields	Template Name	Message Subject	Published	Actions	Fields to be Sent
	93	project_manager	Email PM about completed or canceled task	The Status of Task: "\$formula(\$title)" has been set to \$wfstate	No	Email Project manager of closed or cancelled task	working_notes.id,assigned_to,wfstate,title,project_name,project_status,date_done,assign...
	68	assigned_to	New Task #Sid has been assigned to you	New Task #Sid has been assigned to you	No	Email Assignee of New Task Assignment	id,wfstate,title,date_created,notes,activity_type

Email Template wizard

Advantages

- Does not require building custom text fields or a creating a separate email template table.
- Ability to streamline communication about precise data by including field variables and record hyperlinks in the body of email templates.
- Ability to restrict email recipients and content to a discrete set of options, ensuring consistent communication.
- Prevents human error by running on an automated schedule.

Disadvantages

- Users cannot customize any part of the message or send to other recipients.
- Conditions for rule-triggered, automated emails can be difficult to configure.
- There is less transparency in automatic email processes; users may not know who sent what information to whom or when.
- Rule interactions may post unnecessary messages.

Partially Automated Emails

There are many ways to partially customize an email sent from Agiloft. We will discuss two of the most common configurations below.

Customizable Emails from Process Records

Allowing users to send emails directly from records is a more flexible option than fully automated email. This method lets users create custom messages and subjects and helps them choose recipients and attached files by offering a list of users or files linked to the record. With this method, users can address messages to any recipient in the system and send with an action button. Here is an example of how this setup might look:

The screenshot shows a web interface for a 'Contract' record. At the top, there's a navigation bar with tabs: Details, Attachments, Approvals, Emails (selected), Renewal / Related Contracts, Assets, Signature, Tasks, and History. Below the tabs, the record details are shown. The ID is 530. The Record Type is 'Contract'. The Internal Contract Owner is 'Jared Smith'. The Contract Type is 'Non-Disclosure Agreement'. The Parent Contract ID is empty. The Assigned Team is 'Contract Manager Team'. The Status is 'Draft'. There are two buttons: 'Submit for Review' and 'Cancel Contract'. Below this is the 'Send Email' section. It has a 'Recipient(s)' dropdown menu with 'Choose one' selected. Below that is a text area for 'Emails to CC'. Then there's a text area for 'Email Subject'. Below that is a text area for 'Email Text'. Then there's a multi-select input for 'Files to Send with Email'. At the bottom of the 'Send Email' section is a 'Send Email' button.

Example of using sending emails from within a record

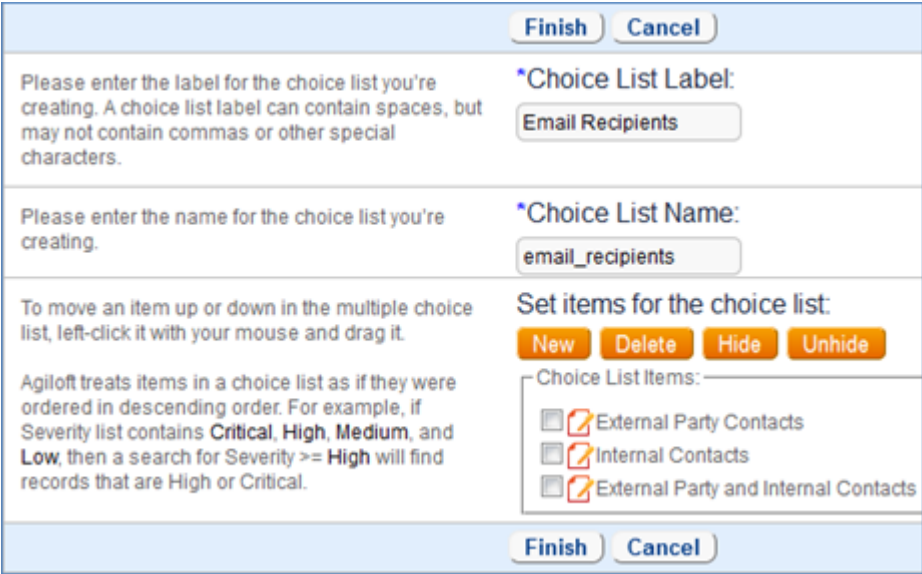
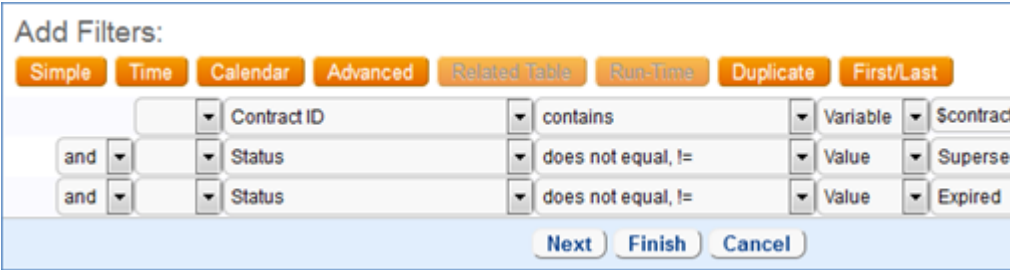
In the image above, the Recipient list is set up to provide a list of possible recipients such as contract managers and contacts linked to the contract. Similarly, the Files to Send with Email is a multi-select input listing linked files. The Email to CC field offers a manual way to add extra email recipients, and the subject and body are free-form.

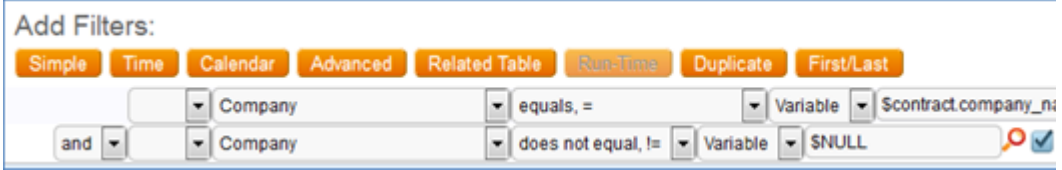
The following section gives step by step instructions for creating this email operation in your own knowledgebase.

Implementation for Sending Email from within a Process Record

Note: If you wish to include the option to add attachments to emails, you must have an attachments table to link to. To send emails from within records, add the following fields to the desired table:

Label	Data Type	Specifications
Email Subject	Short Text	1. 120 display width
Email Text	Text	1. 120 display width 2. 5 rows high

Emails to CC	Email	<ol style="list-style-type: none">1. Set Check for @ in email address to Yes.2. Allow for multiple email addresses to be entered.
Recipient(s)	Choice	<ol style="list-style-type: none">1. Create a new choice list and give it the following specifications:<div data-bbox="448 459 1365 1029"></div>2. Choose to display the as a drop-down list.
Files to Send with Email	Link to single field from other table	<ol style="list-style-type: none">1. Select Attachments table.2. On the Fields tab, select Attached File (Files to Send with Email).3. Set the default value for imported fields to None.4. Under Restrict the attachments from which the values may be imported, create and choos search that finds active attachments that pertain to the original record with:<ol style="list-style-type: none">a. A matching Contract ID–Contract ID contains variable \$contract.id.b. A Status that is not superseded or expired. <div data-bbox="492 1545 1498 1812"></div> <ol style="list-style-type: none">5. Under Select the input aid for the field select Multiple value drop-down list and set height t

Internal Contact (s) to Email	Link to single field from other table	<ol style="list-style-type: none"> 1. Select the Person table. 2. On the Fields tab, select Full Name (External Contracts to Email). 3. Set the default value for the imported fields to None. 4. Restrict the People from which the values may be imported to the following saved search: <div data-bbox="446 403 1502 571" data-label="Form">  </div> <p style="text-align: center;">Saved search example</p> <p>This saved search is designed to find Contract Companies that match the Companies and</p> 5. Under Make the visibility of this field conditional select the Any of the conditions are met and click Add Condition. <ol style="list-style-type: none"> a. In the Link Values pop-up, select Recipient(s) from the drop-down menu. b. Multi-select External Party Contracts and External Party and Internal Contacts. c. Click Finish. 6. On the Display tab, under Select the input aid for the field, select Multiple value box with pop-up and then Add link to source record. 7. Click Finish.
Send Email	Action Button	<ol style="list-style-type: none"> 1. Label the button Send Email. 2. Under Before executing actions choose Save Record and then Execute Actions. 3. Add the following actions: <ol style="list-style-type: none"> a. An email validation action that includes the following criteria: <ol style="list-style-type: none"> i. The recipient field must include an external contact if the user selects External Party Internal or External Party Contacts. ii. The recipient field must include an internal contact if the user selects Internal Party External or Internal Party Contacts. iii. Email Text, Email Subject, and Email Recipients cannot remain blank. b. An If-Then-Else action that includes the following criteria: <ol style="list-style-type: none"> i. If External Party Contacts is selected in Recipients, use email template for external ii. If Internal Party Contacts is selected in Recipients, use email template for internal iii. If Internal or External Party Contacts is selected in Recipients, use email template for external contacts. c. Add a Wait Point with a limit of 120 seconds. d. Add an Update Field action with the following criteria: <ol style="list-style-type: none"> i. On the Fields tab, select Email Text and Email Subject. ii. On the Values tab, select Overwrite the existing value under both fields. iii. On the Errors tab, select Prevent record save and roll back all rules/actions.

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- In the layout wizard, create an Email tab and arrange your fields on the layout.
 - Note: This particular configuration was built for the Contracts table of a Contract Management system, but can be adapted for other applications.

Advantages

- Users have full control over the subject, body, and recipients of the email.
- Users are given a list of possible recipients which they can select.

Disadvantages

- Requires more setup time, since you need to create fields to hold the subject, body, attached files, and recipients.
- Field variables cannot be included in a custom message body.
- Less automation means more work for the user.

Manually Sent Emails from Predefined Templates

Manually sending email templates with predefined messages and bodies requires a separate table that includes fields for attachments and recipients. This configuration is like Customizable Emails Sent from Process Records, with a few notable differences:

- Instead of text and short text fields for the email body and subject, a drop-down menu with pre-defined email templates is available to auto-populate the text.
- Users can be given permission to customize the templates, or permissions can be restricted to sending alone.
- Because the drop-down auto-populates from existing email templates, a separate table to hold the templates is required.

Advantages

- Maintains efficiency and quality in company communications while providing some flexibility. To limit user error, fields in the template table can filter templates available in the process table.
- Provides flexibility by allowing users to select and send email templates at any time. You can allow limited modification of email sent with templates.

Disadvantages

- Building a new table with email template records adds complexity to your KB.
- You cannot include field variables in email template bodies, which limits flexibility.

Free Form Emails

With the email icon found on the action bar, users can select multiple records from a table view and send email in mass format. This method provides the flexibility to modify existing templates and choose recipients, similar to sending emails from process records. You can choose to import from a template or write the content manually, thus giving users the ability to send fully customizable or partially automated emails from a table view.

Sending Emails with the Email Icon

1. From your table view, select a record (or many records) to email. Mouse over the printer icon.

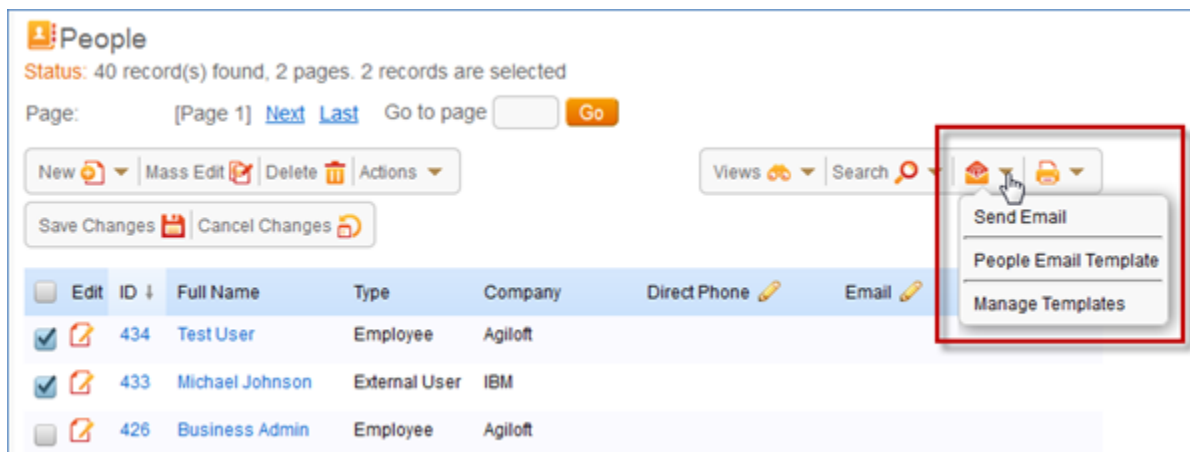
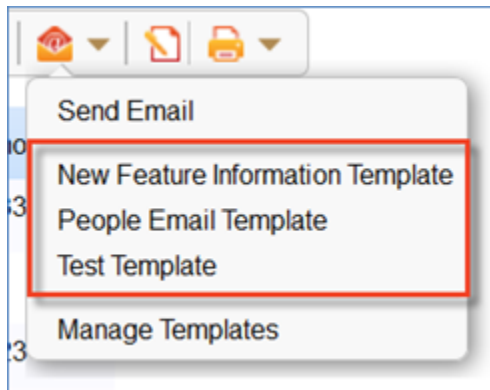


Illustration of sending email with the email icon

2. Click Send Email or choose a template.
3. In the Template wizard you can write the email from scratch, send it from a pre-defined template, or start with a template and make customizations from that.
4. To populate from an existing template, select the users you want to email and mouse over the email icon.
 - a. From the drop down, either select a template or choose Manage Templates. Existing templates are found in the space illustrated below.



Example for finding email templates

- b. The template appears in the email wizard after it is selected, allowing users to make edits specific to their needs.

Advantages

- With appropriate permissions, users can edit any part of an email sent with a template, providing maximum flexibility.
- Field variables and hyperlinks can be included.
- You do not need an extra table with custom fields unless staff need to make modifications.

Disadvantages

- Navigating the Templates wizard found under the email icon is a less intuitive process than filling out standard email fields.
- Users must be trained and given specific permissions to access and use email templates.

Key Questions

When gathering requirements, these questions will help you determine the best email solutions based on the user requirements:

1. What kinds of emails do you want to send automatically?

These might include notifications about record creation, update notifications, or time-based (due date) notifications.

2. What kinds of emails will users need to send manually?

These might include emails unrelated to record changes or schedules, such as irregular or personal communications.

3. Will users write to recipients not held by fields in the record?

If so, you must create a field to hold the recipient email addresses. If this field is multi-choice rather than free form, you can use a filter to make finding email addresses more convenient. For example, you could restrict available email addresses to those associated with a given company.

4. Will users write or modify the body of email templates spontaneously?

If so, you will need a field to hold this text. Email templates may be held either in a simple list in the process table or in a separate source table, and pulled into the process table as a linked set. The advantage of the latter is that you can create filters to make finding the templates easier.

Since filters are dependent on fields in a source table, the fields for a filter must exist in the source table before you create the filter. For example, if you want to restrict templates available in the process table to those for a certain Contract Type, you must have an existing Contract Type field in the source template table.

5. Do users need to specify attached files?

If so, you must create a field to hold the available attachments.

6. What is the role of the user and how advanced is their technical knowledge?

Partially modifiable, automated templates are convenient, but complex interfaces with many fields and options can be overwhelming. If your users have less technical experience, more automation may be preferable.

7. Does email need to include record data in body?

If so, a template with record hyperlinks and variables will transfer this information most conveniently.

Email within Applications

Individual applications present unique requirements and challenges for configuring email preferences. Below we have described a few common examples of how emails can be used within help desk, contract management, and document management systems.

Help Desk

Certain kinds of email are useful for tickets in the Help Desk application:

- Assignment notifications to the Assigned Person or the Assigned Team.

- Notes To/From Customer field update notifications to the Submitter.
- Notes To/From Customer field update notifications to the Assigned Person or Assigned Team
- Completion notifications to the Assigned Person or Assigned Team.

Because these outbound email notifications are standard, sent to recipients already in the record, and triggered by record creation or modification, it is best to automate them.

```
if (Assigned Person changed from: any value to: any value last user's modification and Assigned Person!= 'Updated_by') {
    Email assignee about reassignment
} else if (Assigned Team changed from: any value to: any value last user's modification and Assigned Person=NULL) {
    Email new assigned team about reassignment
}
if (Additional Notes To/From Customer changed from: any value to: any value last user's modification and Status not changed last user's modification) {
    Email customer that case has been updated
}
```

Fields added to the Contract table to allow users to send more customizable emails.

Contract Management

It is possible to automate many notifications in the Contracts table, but users often need to send a specific contract document or non-standard message, frequently to addresses not stored in the system. To accommodate those needs, there are more email fields and filters in the Contracts table. Available recipients can include External Contact(s) to Email or Internal Contact(s) to Email, depending on whether the Recipient(s) field contains External Party Contacts, Internal Party Contacts, or both.

This means that some automation is possible, but you will most likely need to give your users the flexibility to make decisions.

The screenshot shows a 'Send Email' form with the following fields and content:

- Recipient(s):** A dropdown menu set to 'External Party Contacts'.
- External Contact(s) to Email:** A search box with a magnifying glass icon and a list of contacts.
- Emails to CC:** A text input field containing '@agiloft.com'.
- Email Subject:** A text input field containing 'Please review this contract'.
- Email Text:** A large text area containing 'Hi [redacted], Please let me know if you require any changes to this contract.'
- Files to Send with Email:** A list of files including 'Contract ID 340 - al-customer-support-agmt.docx - Document Version 1.docx', 'test.docx', and 'test.docx'.
- Send Email:** An orange button at the bottom.

Document Management

In the following examples, customized emails were required, but most were based on reusable templates. This is a useful option because it preserves the quality of the material by providing a template for users to start with, but still allows the flexibility to make decisions and customize according to company or file type.

Send Email

Recipient(s)
Vendor only

Department Contacts to Email

Vendor Contacts to Email

Add Dept Head

Select any files you want to send

Files to Send

878 Attestation Form.doc
Accounting Structure for Requisitions.xlsx
Accounting Structure for Requisitions.xlsx
Air Filtration PO.pdf
AnnualLeave.doc
ATTENDEES SHEET.doc

If you choose an inbound file here, it will also be sent

Inbound Files to Send

Email Title

1st Vendor Extension Notification

Email Subject

Extension Request from

Email Text

is considering extending the agreement shown above for another year. If you would like to extend, please complete the attached Attestation Form and returned a scanned copy with your e-mail reply. Your prompt reply is appreciated.

Attached Form to be Sent

AttestationForm.docx

Send Email

Based on the Recipient(s) chosen, different email texts are available in the Email Title dropdown.

Reusable templates also save time by eliminating the necessity for users to rewrite a standard email every time.

Email Texts

Status: 16 record(s) found, 1 pages. Click [here](#) to re-count records.

New

Mass Edit

Delete

Actions

Views

Search

	Edit	ID ↓	Title	Email Subject	Email Text	Status to Change Document To	Available for Document Types	Available for Recipients	Attached Form to Include
		22	Final Contractor's License Renewal...	Final Contractor's License Renewal Request from	This is the 3rd and final reminder that the contractor's license on file with , for the Agreement shown above, is set to expire on the expiration date shown. Please...	Notice to Vendor	Contractor License	Vendor only, Both Vendor and Department	
		21	2nd Contractor's License Renewal...	2nd Contractor's License Renewal Request from	This is the 2nd reminder that the contractor's license on file with , for the agreement shown above, is set to expire on the expiration date shown above. Please attach a new...	Notice to Vendor	Contractor License	Vendor only, Both Vendor and Department	

Each email template in the Email Text table has pre-defined subjects, messages, and recipients.