

Notification Actions

Notification actions, formerly Email/SMS actions, are used to send notifications, such as emails or Teams messages, to a user, email address, or team of users based on a template. Notifications are typically sent automatically using rules, action buttons, or workflows, rather than triggered manually. When a Notification action is run on several records, the results can be sent individually or collated into a single notification containing all of the relevant records.

Prerequisites

To send notifications by email, you must have email set up to send from records for that table. For more information, see [Implementing Outbound Email](#).

To send notifications in Microsoft Teams, you must set up the Agiloft app in at least one Teams channel. For more information, see [Setting Up Agiloft for Microsoft Teams](#).

To send notifications by SMS, you must have SMS messaging set up. For more information, see [SMS](#).

Create a Notification Action

You can access the Actions wizard in several ways, but the easiest way is to select Setup [Table] from the table where you want to create the action.

1. From the top nav bar, expand the table's drop-down and select Setup [Table].
2. Select the Actions tab in the Table wizard.
3. Click Create Notification Action.
4. On the General tab, name your action and give it a description.



Once your action is saved, the system automatically adds an E: before your given title. This is because Notification actions were previously called Email/SMS actions.

5. Choose whether you want to send the message through email, SMS, or Microsoft Teams.

Delivery method

- ☒ Send Email
- ☐ Send SMS
- ☐ Send Microsoft Teams Message

6. Navigate to the Message tab and either select an existing template or click New to create a new template.
7. In the template, select the message recipients. Notifications can be addressed to multiple recipients who are selected based on the User, Team, Email, or fields in the record. Teams messages can be sent to a channel where the Agiloft app has been [configured](#). Messages can also be addressed to specific, hard-coded email addresses, but this method is not recommended.

- ✔ Notifications sent to a team are sent to the individual members of that team, using the permissions of each individual. However, if the "Allow emails to be sent to this team" field in the team's record is set to No, the notification is not sent at all.

8. Compose the subject and body of the notification. Notifications can contain specified fields from the record, attachments, and multiple hyperlinks, which allow the recipient to log in and either edit or view the record. They can be sent in either HTML or plain text format.
 - For more information about creating email templates, visit [Sending Emails](#).
 - For more information about creating Teams templates, visit [Setting Up Agiloft for Microsoft Teams](#).
9. Click Finish.

Example

When creating an Email action, you can create a message using an existing template by going to **Insert > Populate from template** and choosing the template. For example, choosing the "Email Contract Owner about renewal date" action results in a message that already contains predefined text and variables, as well as a link to update the contract record. When the action runs, the variables are populated with their appropriate values.

Next

Finish

Cancel

Edit Email Template

*From ▾

Default outbound address demotest@agiloft.com

*Reply-to ▾

Inbound email account for Contract

yourcontractemail@agiloft.com

*To ▾

> Internal Contract Owner

Subject

Contract for \$company_name needs to be renewed

Formula Help

Content

HTML ▾

Edit

Insert

View

Format

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The Contract for \$formula(\$contract_type) described in more detail below has a renewal type of \$renewal_type so it will either expire or auto-renew on \$formula(\$contract_end_date). Please take the appropriate action.

Click [here](#) to update the record directly.

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Attachments:

No Files Attached 📎

Fields Included:

Contract Title, Contract Description, Renewal Type, Contract End Date, Company Name, ID, Contract Start Date

Example email template