

# Email Texts Table

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The Email Texts table is used to store pre-configured email templates that can be used to send standardized emails from various places in the system.

The records are used to store one template each. These records contain a variety of information:

- Title
- Email Subject
- Email Text
- List of addresses to CC
- Type of recipients the Email Text is available for (External, Internal or both)
- If the email is required to have an attachment when sent
- The table that the Email Text is available from (Contracts, Documents, Projects, etc.)

The Email Subject and Email Text fields can include formulas that get automatically replaced with the information from the contract when the email is sent.

Email Subject	Sourcing Event Requires Department Manager Review
Email Text	<div><p>Dear \$department_head,</p><p>Sourcing Event #Sid "\$solicitation_title" requires review by your department. Your input is needed before the Sourcing Event Manager proceeds further with the Sourcing Event.</p><p>If you do not provide this information, the status of this Sourcing Event will change to "canceled" within 7 days.</p></div> <div>Edit</div>

## Use Case

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Email Texts can be created by members of the Admin, Approver and Manager groups (Admin, Admin Import, Business Admin, Approver, Change Manager, Configuration Manager, Contract Manager, Customer Manager, Document Manager, Procurement Manager, Project Manager and Service Manager).

Email Text records are created directly from the Email Texts table.

An Email Text title should reflect the purpose of what the Email Text is trying to accomplish. It is also important to select the correct tables and types of recipients for Email Text, as this determines which lists contain this the Email Text record.

Email Text records can be set to require an attachment, and the system does not allow the user to send an email without a file attached to it.

After an Email Text record is created, it appears in a drop-down list of available templates in the Send Email section of the Contract record in the Emails tab. After choosing an Email Text from the list, the Subject, Body and CC list populates with information from the Email Text record. The Email Text can be edited if needed or sent as is, which greatly reduces time spent on composing meaningful emails.

If an Email Text is no longer needed, but future use is uncertain, the status can be changed to Inactive. Doing so removes the template from all lists of available Email Texts, while keeping the record so it can be activated again if needed.

## Ownership

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Email Text records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.