Email Templates in Remedyforce

Email templates in Remedyforce are read-only and depending on the selected template fields, can be pulled directly from the service request or incident record.

Sending an email message using Email Templates

1. Click the Remedyforce Console tab.

2. From the list of records, select the record from where you want to send an email message.

3. From the Actions menu, select Email.
4. The To field is filled with the **email address** of the client of the record. The **Subject of the email message** is filled with the record number.

5. From the Email Template list (A), select the template for the email message. When you select an email template, you cannot make changes to the Subject and Attachments of the email message.

6. To **preview** the selected email template, click Preview (B). In the preview window you can review the selected email template for the email message.
7. In the body of the email message, additional information can be added to the email. To verify if additional information can be added to a selected email template, click Preview. (A) Depending on the email template verbiage the information that is typed in the body of the email will connect to the additional information field on the email template after the email has been sent. (B)

8. Once the desired email template has been selected, click Send. An Email Sent action record is created in the Action History section. The type of action record and the subject of the email template are added to this section of the record.

Adding additional information using the Copying Fields option

1. To copy the field values from the Incident form, such as the value of the Description field in the email body, select Copy data from Incident fields option.
2. When you select the **Copy data from Incident fields** check box and right-click in the email body, a list of all the fields available on the incident form that are accessible to the logged-on user is displayed.

3. Select a field to get the value of the selected field in the email body.

4. If the field has a value, it is inserted in the email body.

5. Click, **Send**.