

Creating a New Email Address

Last Modified on 02/26/2025 1:40 pm EST

Overview

The Email Ingestion feature allows Administrators to create new email addresses to generate new objects and automatically map data from submitted emails to object fields. Administrators can also customize who is notified when submitters reply via email. To enable the Email Ingestion feature, an Administrator must create new email settings and object types.

User Account Requirements

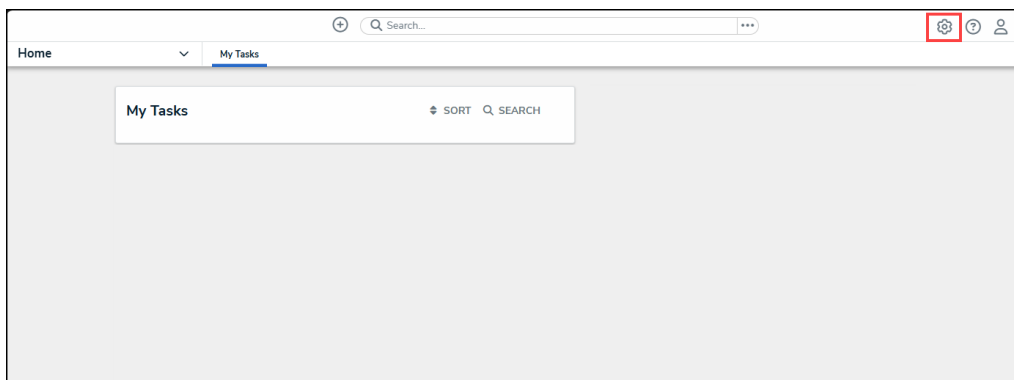
The user account you use to log into Resolver must have Administrator permission to access the **Email Settings** tile.

Related Information/Setup

Please refer to the [Using Two-way Email](#) article for instructions for enabling that feature on an object type.

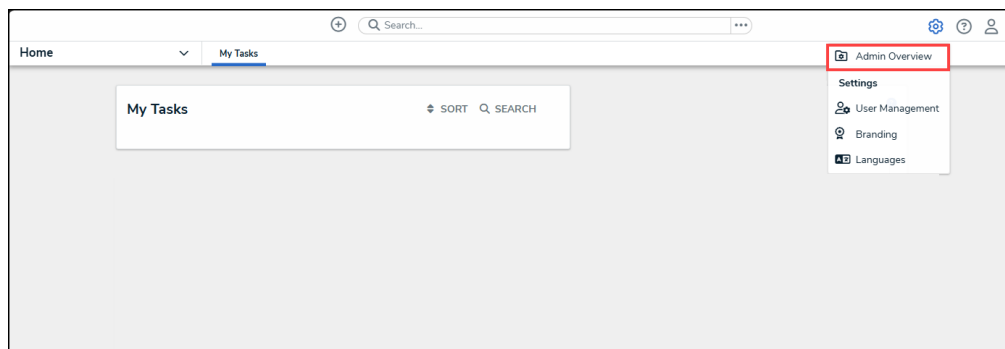
Navigation

1. From the **Home** screen, click the **Administration** icon.



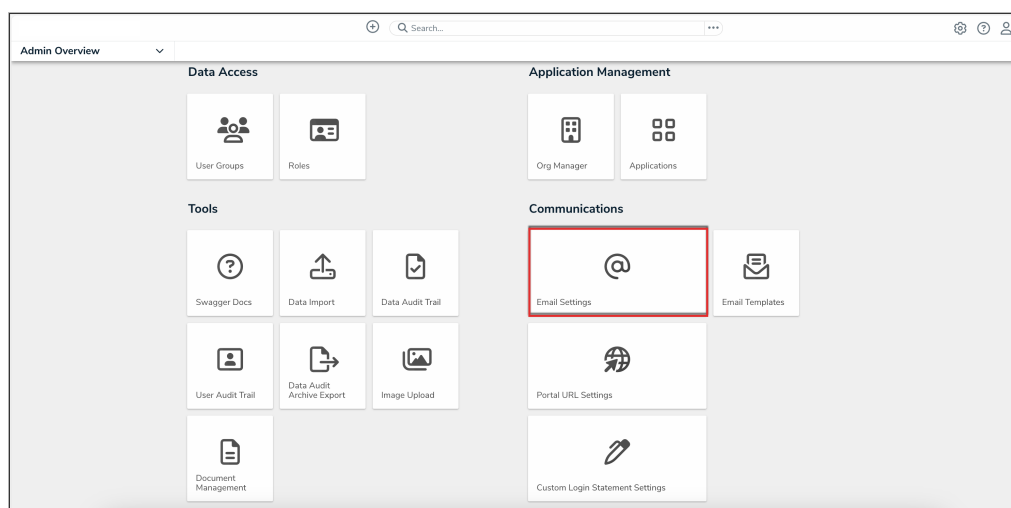
Administration Icon

2. From the **Administrator settings** menu, click **Admin Overview**.



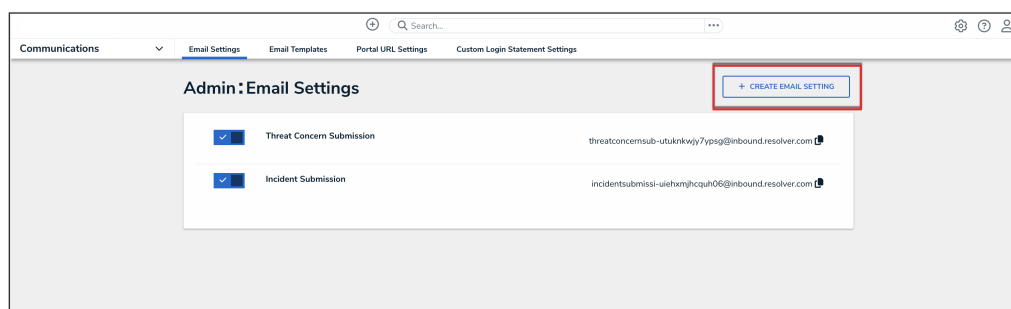
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Email Settings** tile under the **Communications** section.



Email Settings Tile

- From the **Email Settings** screen, click the **Create Email Setting** button.

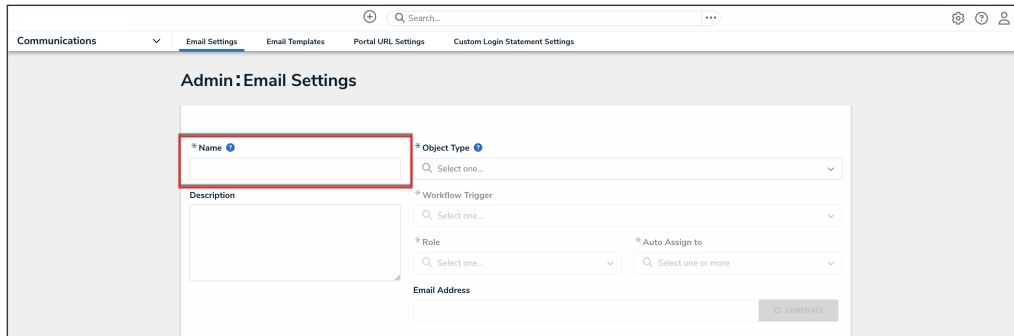


Create Email Setting Button

Creating a New Email Address

An email address can only be generated once an Administrator selects an object type, workflow trigger, role, and user assignment. Entering information into these fields determines what type of object gets generated by this email address and what happens after creation.

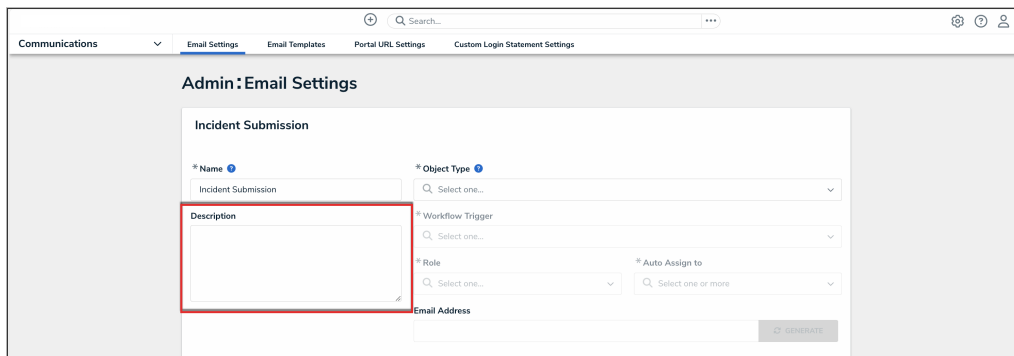
1. From the **Email Settings** screen, enter a name for the new email setting in the **Name** field. The **Name** field has a maximum character limit of 50 characters.



The screenshot shows the 'Admin: Email Settings' form. The 'Name' field is highlighted with a red box. The form includes fields for 'Name', 'Object Type', 'Workflow Trigger', 'Role', 'Auto Assign to', and 'Email Address'. The 'Name' field is currently empty.

Name Field

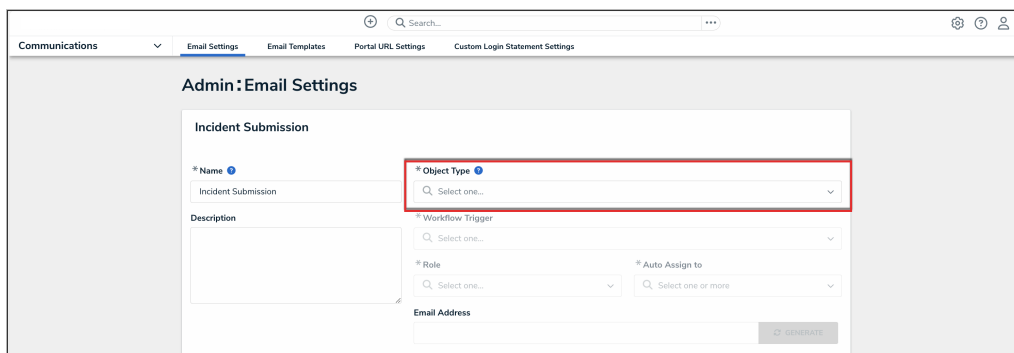
2. **(Optional):** Enter a brief description outlining the email address's intended use in the **Description** field.



The screenshot shows the 'Admin: Email Settings' form. The 'Description' field is highlighted with a red box. The form includes fields for 'Name', 'Object Type', 'Workflow Trigger', 'Role', 'Auto Assign to', and 'Email Address'. The 'Description' field is currently empty.

Description Field

3. Select an object type from the **Object Type** drop-down menu. The selected object type determines the type of object (e.g., activity) that is created by the email. You can edit the object type field after the email address is created. Selecting an object type will unlock the workflow trigger, role fields, and the **Email Data** section.



The screenshot shows the 'Admin: Email Settings' form. The 'Object Type' drop-down menu is highlighted with a red box. The form includes fields for 'Name', 'Object Type', 'Workflow Trigger', 'Role', 'Auto Assign to', and 'Email Address'. The 'Object Type' field is currently empty.

Object Type Drop-down Menu

4. Select a workflow trigger from the **Workflow Trigger** drop-down menu. The workflow

trigger indicates at which workflow state the email is generated (e.g., Submit, etc.).

The screenshot shows the 'Admin: Email Settings' page for 'Incident Submission'. The form includes fields for Name, Description, Object Type, Workflow Trigger, Role, Auto Assign to, and Email Address. The 'Workflow Trigger' dropdown menu is highlighted with a red box, showing a search bar and the text 'Select one...'.

Workflow Trigger Drop-down Menu

5. Select a role from the **Role** drop-down menu. The role selected is assigned the object generated by the incoming email. The **Auto Assign to** field will unlock after a role is selected.

The screenshot shows the 'Admin: Email Settings' page for 'Incident Submission'. The form includes fields for Name, Description, Object Type, Workflow Trigger, Role, Auto Assign to, and Email Address. The 'Role' dropdown menu is highlighted with a red box, showing a search bar and the text 'Select one...'.

Role Drop-down Menu

6. From the **Auto Assign to** drop-down menu, select a user or user group that will be assigned to the created object. Objects can be assigned to multiple users or user groups.

The screenshot shows the 'Admin: Email Settings' page for 'Incident Submission'. The form includes fields for Name, Description, Object Type, Workflow Trigger, Role, Auto Assign to, and Email Address. The 'Auto Assign to' dropdown menu is highlighted with a red box, showing a search bar and the text 'Select one or more'.

Auto Assign To Drop-down Menu

7. The **Email Data** section allows Administrators to map email data to applicable fields on the generated objects. The following are optional fields for additional configuration:
 - a. From the **Sent Date** drop-down menu, select a sent date option to be used as the

date the email was sent (e.g., Expiry Date, Start Date, etc.).

- b. From the **From Address** drop-down menu, select a from address option for the email.
- c. From the **To Address** drop-down menu, select a to address option for the email.
- d. From the **Subject** drop-down menu, select an email subject option. The email subject field will be populated using the content from the selected subject option.



Warning:

Generating an email without mapping the email's **Body** and **Subject** will result in a blank object, and the report content may not be saved.

- e. From the **Attachment** drop-down menu, select an attachment option to include the attachments within the email.
 - Observational attachments
 - Outcome attachments

Please adhere to the following attachment restrictions:

- Only one attachment field can be used.
 - An Org can have a maximum of 100 email settings.
 - Emails have a maximum of 30 MB, including all content, headers, attachments, etc.
 - Emails can only be exchanged on an object originated by email between Resolver users <> submitter.
 - Attachment fields are the only fields that will continue to map values in subsequent submitter replies.
- f. From the **Attach Message as EML File** field, select the **Yes** button to attach attachments to the email using the EML (Electronic Mail or Email) file extension that uses the Internal Message format protocol.



Note:

If this email is in response to a two-way communication, the message EML file will not be attached when the submitter opts to remain confidential, even if **Yes** is selected.

- g. From the **Email Confirmation Template** drop-down menu, select an email template to return an automatic confirmation message back to the sender using the selected template.
8. The **Body** field is the only mandatory field which must be mapped. Select an email body

option from the **Body** drop-down menu. The body of the email will be created using information from the option selected.

Body Drop-down Menu



Warning:

Generating an email without mapping the email's **Body** and **Subject** will result in a blank object, and the report content may not be saved.

9. Scroll back to the **Email Settings** section and click the **Generate** button to generate a system-assigned email address. The system-generated email address cannot be edited. The email will be created using the **Name** field value and a unique 16-character string of random alphanumeric values.

Generate Button

- After the email address is generated, the **Generate** button will become a **Copy** button, allowing users to copy the email address to the PC clipboard.
10. Scroll to the **Notification for New Replies** section to customize a state's action and indicate which workflow trigger is initiated based on email replies from a submitter. The state fields on the **Notification for New Replies** section will differ based on the object type selected in the **Object Type** field.
 - To configure a state field, click the drop-down menu and select an action for the

state.

- After adding actions to states, click the **Done** button to save your changes and return to the previous screen.

Done Button

- Click the **Delete** icon to delete the email settings. Deleting an email setting prevents further communications between the email submitter and an Administrator.



Warning:

Resolver recommends never deleting an email setting once it's in use. For additional guidance, please contact [Resolver Support](#).

Delete Icon