

How to Modify Email Templates

TI version 10.8

APPLICABLE TO:

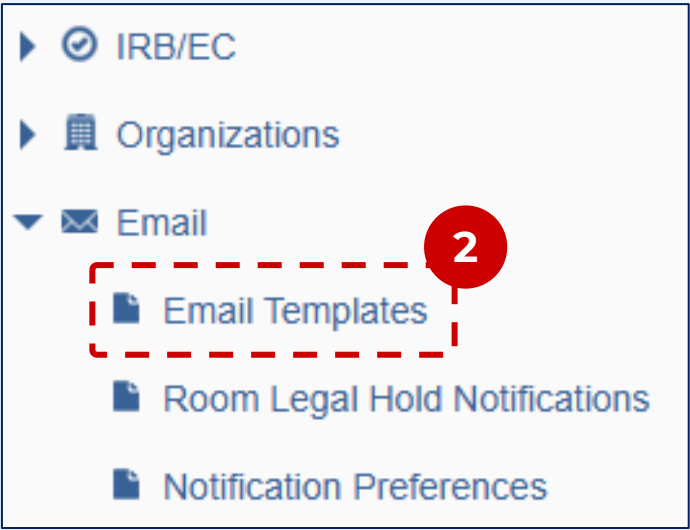
- ☒ Admin
- ☐ Manager
- ☐ Editor
- ☐ Reader
- ☒ eTMF (Study Start-Up)
- ☒ Collaborate
- ☒ eISF

The emails that a TI room sends to its users are generated from templates, which can be customized to reflect the company identity and project preferences of our clients. This Job Aid shows Admins how to find and edit such email templates.

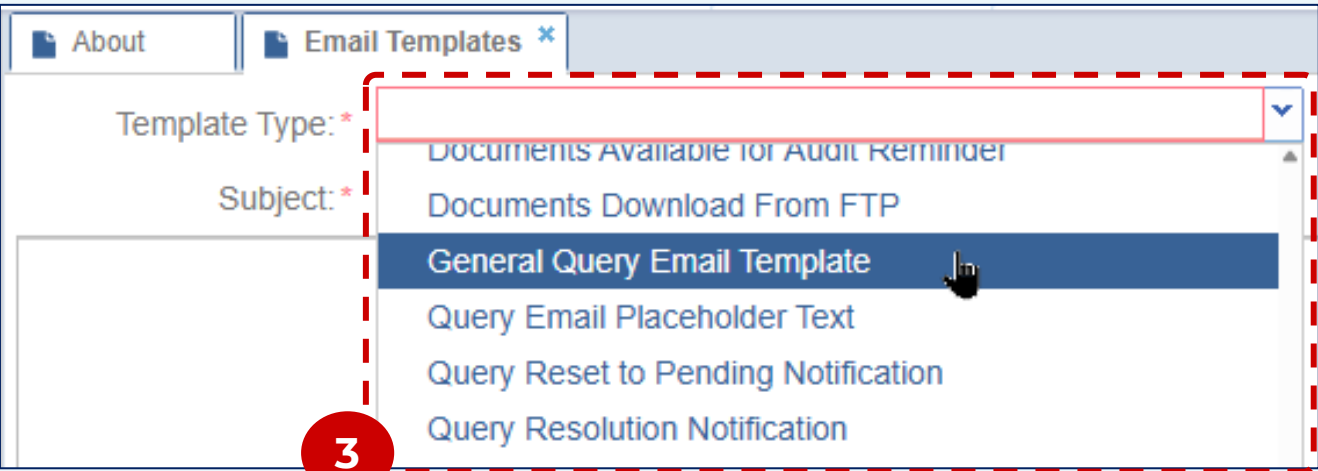
1 Enter the desired room and select **Settings** within the Navigation Grid.



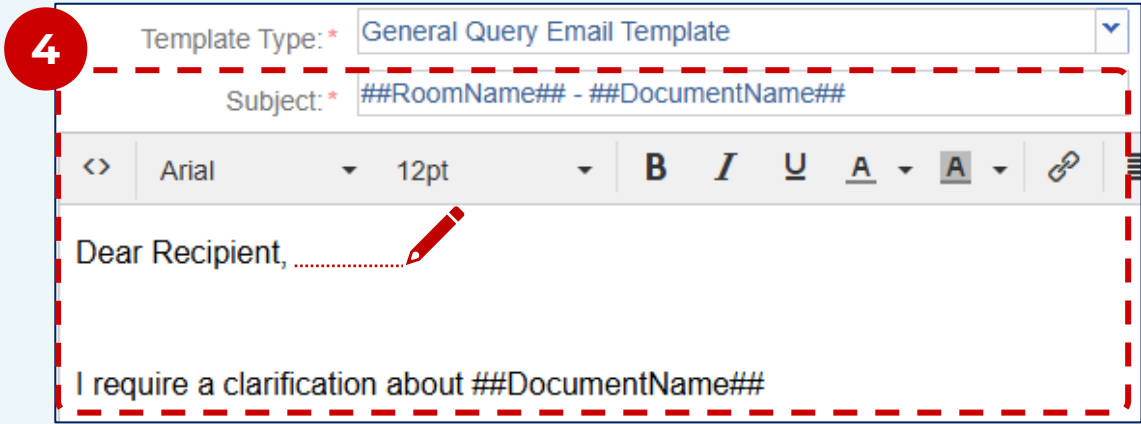
2 In the settings browser on your left, expand the **Email** category menu and choose the **Email Templates** sub-menu.



3 Choose the template you want to edit from the **Template Type** drop-down menu.



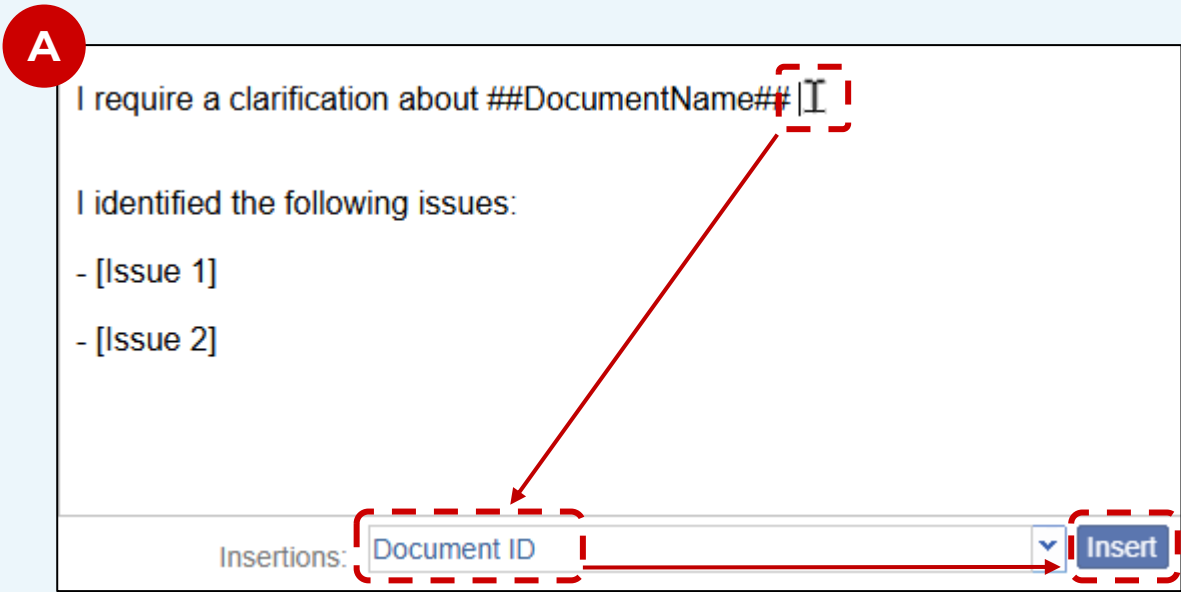
4 Rewrite the **Subject** field and email body, or add insertions as needed.



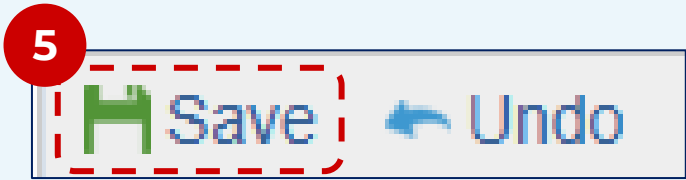
A

Insertions

- Place cursor where the auto-text should be entered.
- Choose the field to be used from the drop-down menu.
- Click Insert.



5 Click **Save** at the bottom of the screen when you're done editing.



6 Click **Change Log** near the bottom-right corner if you wish to view a history of template updates.

