Email Templates

Email Templates

Purpose and when to use this record

Maintain reusable email subject and body content used when Brisk sends business documents or notifications.

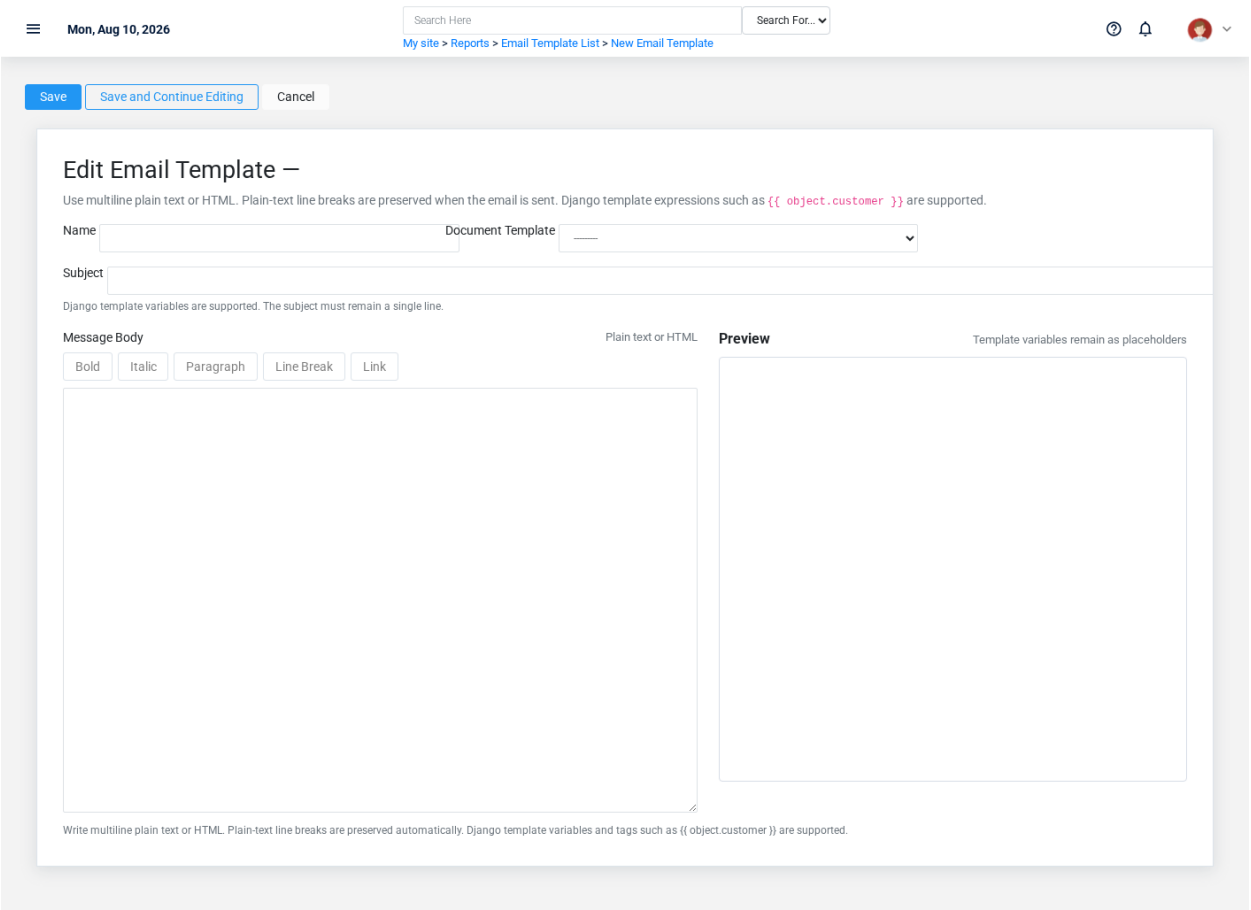
At a glance

- **Identify it by: Name**.
- **Check its business context: Pdf Renderer**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on email templates. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Create an Email Template



The Email Templates create screen in the Brisk documentation demo.

Create an Email Template only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Pdf Renderer**.
2. Enter the required identifying and operational values: **Name**, **Subject**, and **Body**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Email Template, then confirm **Name** on its detail page before continuing.

After saving: Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete an Email Template

Delete this Email Template only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

On the confirmation page, verify **Name**. After confirmation, return to the Email Templates list and make sure only the intended Email Template was removed.

Review Email Template details

Use the detail page as the shared record of what this Email Template currently means. Verify **Name**, **Pdf Renderer**, **Subject**, and **Body** before relying on it for a decision.

Follow **Pdf Renderer** to determine whether the issue is on this Email Template or on one of those linked records.

Next check: Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

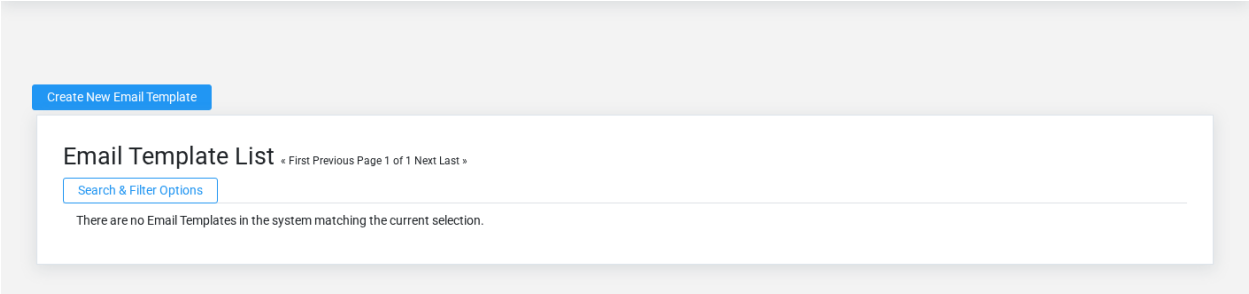
Edit an existing Email Template

Edit this Email Template when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Pdf Renderer** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Email Template now appears under the expected **Name**.

After the change: Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review email templates



The Email Templates list screen in the Brisk documentation demo.

Use the Email Templates list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Pdf Renderer**.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the Email Template whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 4 user-relevant fields for this Email Template, including 1 linked-record selection and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Human-readable name for this mail template.
Pdf Renderer	No	The pdf renderer associated with this mail template.
Subject	Yes	The subject recorded for this mail template.
Body	Yes	The body recorded for this mail template.

What happens next

Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name**, **Subject**, and **Body** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Pdf Renderer** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3
Created 2026-08-10 16:09:29 UTC by Brisk
Updated 2026-08-10 20:29:37 UTC by Brisk