

Sample Notification Templates

datto | AUTOTASK PSA

Angela Richer just sent you a Notification.
This Ticket was Edited: [T20201218.0002](#)

Critical Path **In Progress**

Test
test

TICKET DETAILS

Company: A1 Facilities Management	Issue Type: SW:Defect
Contact:	Sub-Issue Type: Rapid Response
Source: Test	Work Type: IT:Onsite
SLA: Standard for ALL	Contract:

ASSIGNMENT / DATES

Assigned To: Angela Richer	Due Date: 24/12/2020
Queue:	Estimated Hours: 1.00
Created By: Angela Richer	Worked Hours: 0.00
Create Date: 18/12/2020	

CONFIGURATION ITEM

Name:
Serial Number:
Reference Number:

This notification was generated by Datto's [Autotask PSA](#)

About the templates in this ZIP file

This ZIP file contains sample notification templates for all entities in your database except Client Portal and Taskfire, and all events associated with these entities. You can copy them into your database or use them for ideas on how to create your own templates.

Use the **Events** spreadsheet in the ZIP file to associate the templates with the appropriate events. Note that some templates support multiple events (Created, Updated, and Forwarded).

The templates are provided as-is. We do not update them for each release. If you add them to your database, it is helpful if you are able to create HTML code so you can make any changes you desire. Datto Support is not responsible for assisting you with customizing the templates.

Get Ready

If you would like to add the notification templates to your database, do the following:

1. Extract the contents of the ZIP file. The templates are organized in folders that match the tabs of the Notification Templates page and named after the event they are associated with.
2. Log into Autotask PSA with **Administrator** permissions.
3. Navigate to **Admin > Features & Settings > Your Organization > Logos**. Upload the **MapLocationIconUsedinNotificationDoNotDelete.png** image to the Logos page. Do not change the name. Right-click on it and select **Set as Other Logo Image**.
4. Make sure your company logo is set as your **Primary Logo Image** since it will appear at the top of each template.

Create the New Templates

1. Navigate to **Admin > Notification Templates**.
2. Click **New**. Populate fields following the general directions in the [Add or Edit Notification Templates](#) topic in the Online Help.
3. Associate each template with the events listed in the **Events** spreadsheet in this ZIP file and copy the matching string into the **Email Subject** field (or edit as needed).
4. Open the first HTML template in **Notepad++**.
5. Copy the entire page.
6. On the **Email Body – HTML** field, click the **HTML** tab. Delete whatever is in it and paste the copied HTML code into it.
7. Click the **Design** tab and review the template. Modify as needed. **Tip:** you can type text and insert variables in Design mode.
8. Send a test email to yourself and if you are happy with the template, save and close it.
9. Repeat this process for each template file.

At this point, both the old and the new templates are available in your database. The old ones are still the default templates.

Finalize

1. Test each template by triggering one of the events that uses the template and on the **Notification tab or section**, select yourself as the Notification recipient.
2. If you are happy with the template, on the Notification Templates page, **right click** on it and make it the **default template** for the event.
3. **Disassociate** the old template from the event.
4. Finally, when you are completely comfortable with the new templates, **inactivate or delete** the old templates.