How to view and update recipient profiles

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Recipient profiles are standardized "to" email addresses that can be re-used for any emails generated within the system. The profile includes the reply-to name and email address to which the email recipient can reply back to.

To add, edit, view the usage, or restore the defaults for a Recipient Profile, use the steps below:

1. Click **Settings** or the **Gear icon** on the left menu.

2. Click on the **Communication** tab.

3. Click **Recipient Profiles** from the **Email Settings** section on the page.

Adding a Recipient Profile

1. Click the **Add Recipient Profile** button.

2. The Add Recipient Profile pop-up will appear, with a few fields.

   - **Name** - The name of the Recipient Profile.

   - **Description** - The Description of the Recipient Profile.

   - **Recipient Name** - The name of the recipient.

   - **Recipient Email** - The recipient's email address.

   - **Set as Default** - When Recipient Profile option is selected to receive an email, but no single Recipient Profile is selected. The default Recipient Profile will receive the email.

3. Click the **Save** button to add the Recipient Profile.

Editing a Recipient Profile

1. On the same line as the Recipient Profile, click the **dropdown arrow** on the Actions column, then click **View**.

2. Click the **Edit** button.

3. You will now see a few fields.

- **Name** - The name of the Recipient Profile.

- **Description** - The Description of the Recipient Profile.

- **Recipient Name** - The name of the recipient.

- **Recipient Email** - The recipient's email address.

- **Set as Default** - When Recipient Profile option is selected to receive an email, but no single Recipient Profile is selected. The default Recipient Profile will receive the email.

4. Click **Save** once done.

Viewing the usage of a Recipient Profile

1. On the same line as the Recipient Profile, click the **dropdown arrow** on the Actions column, then click **Usage**.

2. The Usage page displays where this Recipient Profile was used.

Resetting a Recipient Profile

1. You can reset a Recipient Profile back to the system default values by clicking on the **dropdown arrow** in the Actions column on the same line as the Recipient Profile, and then clicking on **Restore System Values**.

2. A pop-up confirmation message will display, click **OK** to reset it back to the system default values.

Setting a Recipient Profile to the default Recipient Profile

1. On the same line as the Recipient Profile, click the **dropdown arrow** on the Actions column, then click **Set As Default**.

2. A pop-up confirmation message will display, click **OK** to set it as the default Recipient Profile. This will use this Recipient Profile when the Recipient Profile option is selected to receive an email, but no single Recipient Profile is selected.