

-->

# Canned Text in Halo

Last Modified on 11/07/2025 12:05 pm EST

Canned text in Halo allows you to quickly include saved text in a reply to a ticket (ZenDesk users: these are like macros in ZenDesk).

Examples of canned text include:

- A solution to a common problem.
- Frequently used instructions.

This article covers how to use canned text in Halo and how to create canned text of your own.

## Before You Start

You will need the following before you can complete this task:

- An active Halo agent account
- Be logged into the [Halo agent application](#)

## Inserting Canned Text

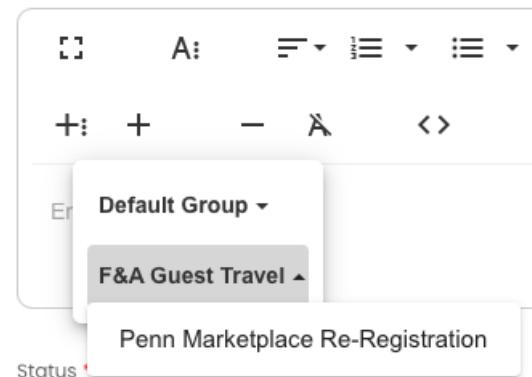
Canned text icons, the two plus signs highlighted below, are available on the Halo text editor when you're creating a private note or crafting an email reply.



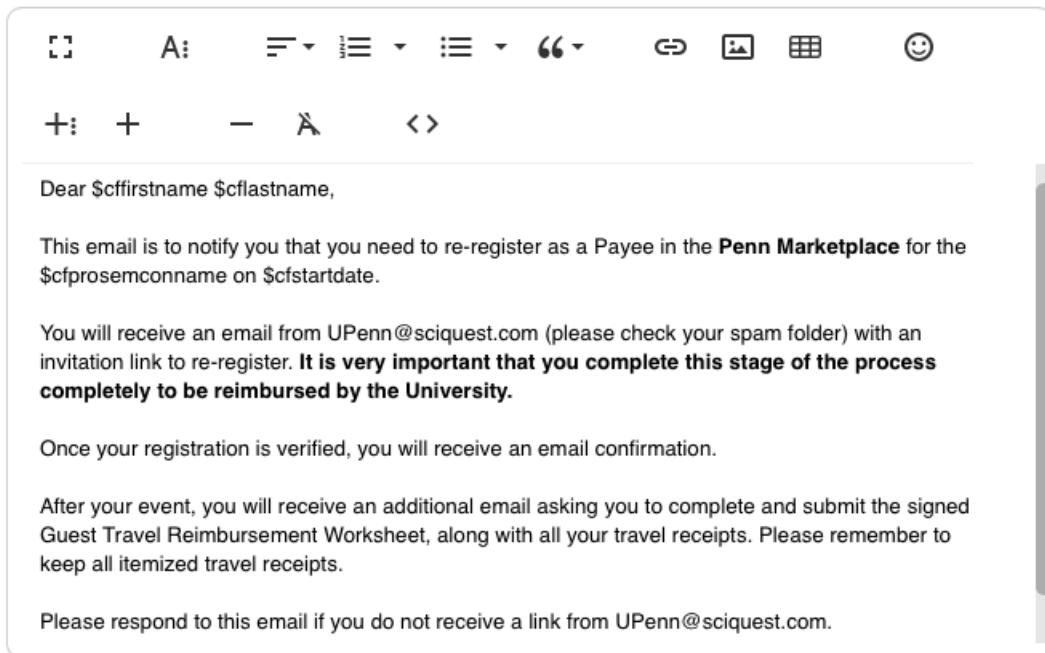
Clicking the first icon allows you to select some canned text you'd like to insert in your note. The canned text options are grouped to make it easier for you to find the right text. Click on the group name you're interested in and the canned text options in that group are listed.

Click on the text you want, in this case Penn Marketplace Re-Registration, and the text appears in the text editor.

You can edit the text as you normally would, or just send the message should the canned text cover all the information you need to include.



 Scott McNulty  
Private Note



Dear \$cfffirstname \$cflastname,

This email is to notify you that you need to re-register as a Payee in the **Penn Marketplace** for the \$cfprosemconname on \$cfstartdate.

You will receive an email from UPenn@sciquest.com (please check your spam folder) with an invitation link to re-register. **It is very important that you complete this stage of the process completely to be reimbursed by the University.**

Once your registration is verified, you will receive an email confirmation.

After your event, you will receive an additional email asking you to complete and submit the signed Guest Travel Reimbursement Worksheet, along with all your travel receipts. Please remember to keep all itemized travel receipts.

Please respond to this email if you do not receive a link from UPenn@sciquest.com.

Canned text can include some text that begins with a dollar sign (\$). These variables will be automatically populated with the right information related to the ticket that you are sending the canned text from (for example, \$cfffirstname will be replaced with the requester's first name).

## Adding an Image to Canned Text

Once you've inserted your canned text of choice you can, of course, edit the text. You can also insert images, which can be handy when you need to include information from another system:

1. Once you've selected your Canned Text in the text editor click on the **Insert Image** icon.
2. Click on **Drop image** to open a file browser.
3. Find the image you'd like to include and click **Upload**.
4. The image is inserted into the text editor. You can now edit the message. Click **Send** when you're ready to send your email.

# Creating Canned Text

Any text you put into the Halo text editor can become canned text by:

1. Enter some text into the Halo text editor (either for a private note or an email).
2. Select the text that you'd like to include in your canned text. You can select all of the text you've entered, or just part of it, but you must select something or else the canned text will be blank.
3. Click the **+** button on the editor's toolbar.
4. Fill out the New Canned Text form.

The screenshot shows the 'New Canned Text' form in the Halo text editor. The 'Details' tab is selected. The 'Name' field contains 'Testing Text'. The 'Group' field is set to 'Default Group'. The 'Text' editor contains the text 'This is the text I'd like to have in canned text.' The 'Advanced' tab is shown below, featuring a 'Tags' section with a text input field for adding tags.

- a. Name: A name for the canned text. This will appear in the dropdown so make the name something meaningful.
- b. Group: Select a group from the dropdown.
- c. Text: The text you selected will already be in the text box. Edit it as you see fit.
- d. Advanced: Add a tag under Advanced if you'd like to automatically tag any ticket that uses this particular canned text.

5. Click **Save**.

6. Your new canned text will now appear in the group you selected.

