

-->

Emailing from a Halo Ticket

Last Modified on 11/21/2025 1:54 pm EST

There are times when you'll need to reach out to a requester for more details and you can do this without leaving Halo! Emailing someone from a ticket in Halo will generate an email notification to anyone in the To, CC, or BCC field. This notification will include links to the ticket in the the Portal, not the Agent Application. This means that when an agent clicks a link in one of these notifications they may get a permissions error. You can either switch to the user portal view, or search for the ticket in the agent application.

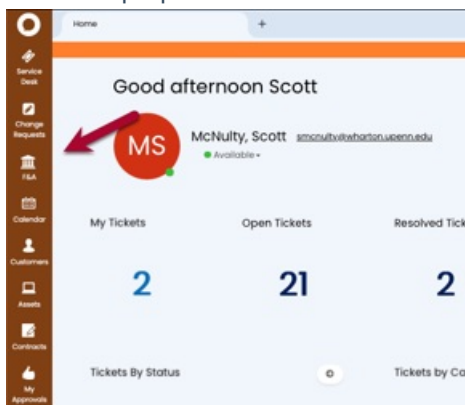
BCCing someone sends an email notification with the ticket information, but doesn't grant access to the ticket in Halo. If the BCC'ed party doesn't already have access to the ticket they won't be able to see it in Halo.

Before You Start

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

- An active Halo agent account
- Access to Halo tickets

1. **Log in to Halo.**
2. Select the proper module from the sidebar (We'll be using F&A for these instructions).



3. Click on the ticket that you need to email from.
4. Click the **Email User** button at the top of the ticket.

← Private Note Email User Re-Assign ...

[Ticket#0000425]

Receipts

New 10/27/2025 10:53 AM In Progress Resolved

Progress Details Event Log Audit Log

SM Scott McNulty (You) 10/27/2025 10:53 AM
Assign Ticket

SM Scott McNulty (You) 10/6/2025 3:28 PM
Opened
New
From: #368

5. An email editor will appear in the Progress section of the ticket. This allows you to compose an email to the requestor. Type an email, as you would normally, using the text controls in the editor to format the text.

[Ticket#0000425]

Receipts

New 10/27/2025 10:53 AM In Progress Resolved

Progress Details Event Log Audit Log

SM Scott McNulty 10/27/2025 10:53 AM
Email User

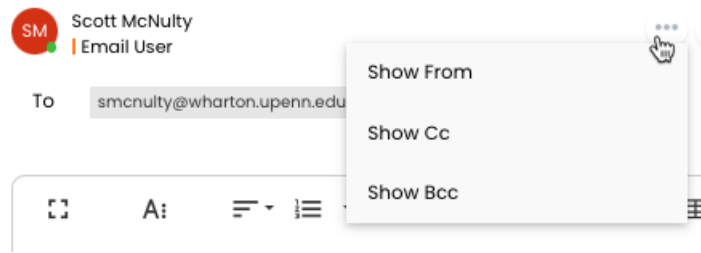
To: smcnulty@wharton.upenn.edu

Type your update/note here

Status *
With Requester

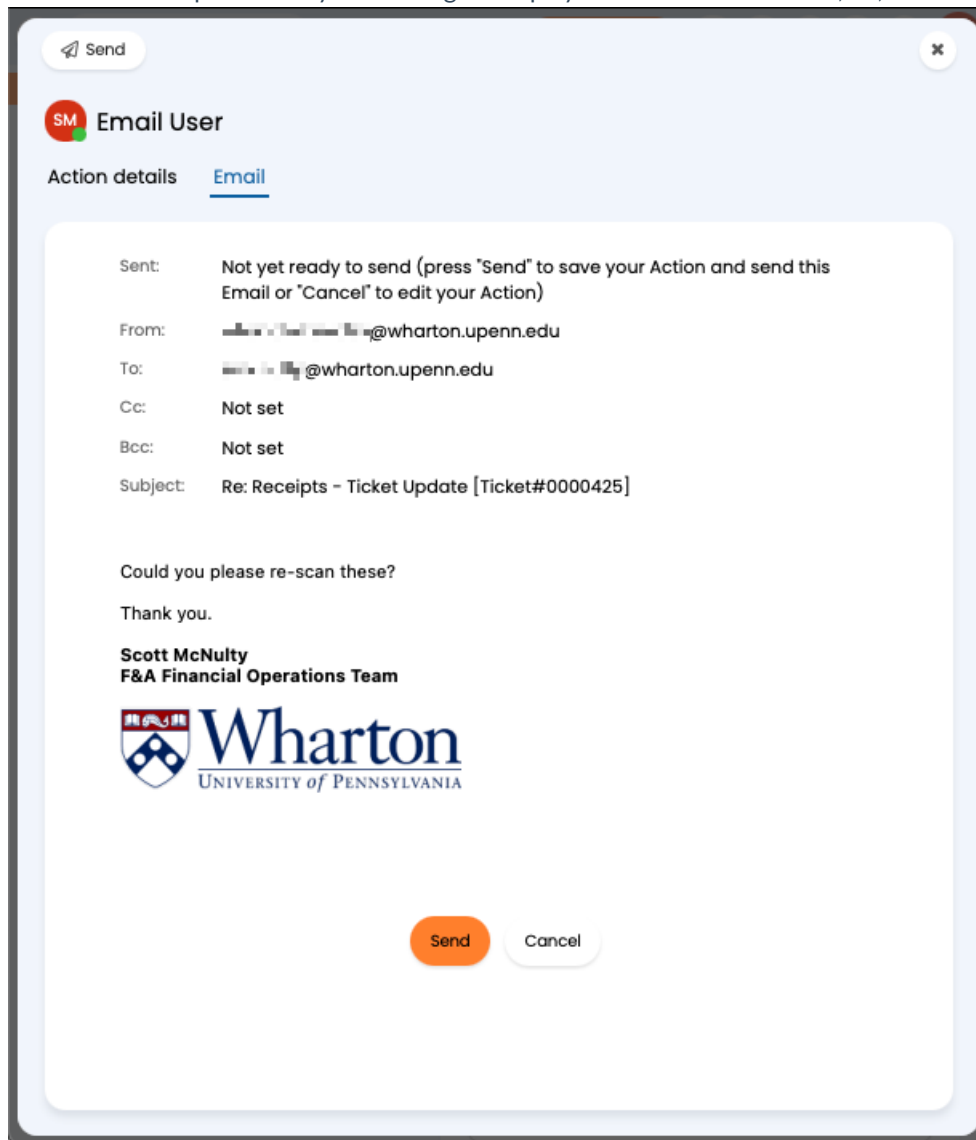
Send Discard

If you want to add a CC or BCC to the email click on the... button and you can add both or either by clicking on **Show Cc** or **Show Bcc**.



You'll need to enter an email address (or addresses) in either field.

6. Once your message, and any additional recipients, is set you'll need to select a Status for the ticket from the dropdown. By default the status will be set to With Requester, but you can change it if you would rather a different status.
7. Click **Send** and a preview of your message is displayed. Doublecheck the To, Cc, and Bcc lines.



8. Once you're happy with your message click **Send** in the preview and the email is sent to all the recipients and a copy is kept right in the ticket for tracking purposes.

 [Ticket#0000425]

Receipts



[Progress](#) [Details](#) [Event Log](#) [Audit Log](#)



Scott McNulty (You)

10/28/2025 1:09 PM

Email User

[W/ Requester](#)

To: smcnulty@wharton.upenn.edu

Could you please re-scan these?