

Create a New Custom Email Template

Last Modified on 02/19/2025 10:16 am EST

Overview

When the Messaging action has been created on a workflow transition, an email is sent to the users referenced in the **Roles** field on the workflow transition when the object transitions to the next state. The contents of the email are based on the email template selected when the action was created.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to configure and create email templates.

Related Information/Setup

Please refer to the Using an Organization Logo for Branding Email Templates article for further information on how to use the organization logo to brand email templates.

Please refer to the Popular Markdown Styles article for more information on Markdown Formatting.

Please refer to the Email Template Variables article for more information on adding email variables.

Navigation

1. From the *Home* screen, select the Administration Icon.

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Home ~	My Tasks			

Administration Icon

2. From the Administration Settings menu, click the Admin Overview link.



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Admin Overview Link

3. From the *Admin: Overview* screen click the **Email Templates** tile under the **Communications** section.

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	Document Management			Custom Login Statement Settings		

Email Templates Tile

4. From the *Admin: Email Template* screen, click the + **Create Email Template** button.

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+ Create Email Template Button

Note:

All Organizations have two default templates (Assigned and Standard) that are listed on the Admin: Email Templates screen. For more information see the Edit the Default (Standard or Assigned) Templates article.



Creating a New Email Template

 From the *Email Templates: Create an Email Template* screen, enter a unique email template name in the **Email Template Name** field. An email template name cannot be use more than once.

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	* Email Subject	Line 😧					
	e.g. Your Actio	n is Required					
	*Email Body 😮	•					
	e.g. Please con	nplete your Risk Mana	gement Action Plan v	vithin the next 2 weeks. Pa	t due Action plans will be escalated to th	e Executive responsible	

Email Template Name Field

- 2. Enter an email subject in the **Email Subject Line** field. The subject line entered must be at least 5 alphanumeric characters.
 - User can also use the {orgName} variable in the Email Subject Line field to automatically populate their organization's name. The {orgName} variable is case sensitive.

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	e.g. Please con	nplete your Risk Mana	gement Action Plan v	within the next 2 weeks. Pa	st due Action plans will be escalat	ed to the Executive responsible	

Mail Subject Line Field

 Enter a custom message in the Email Body field. The custom message entered in the Emal Body field must be at least 10 alphanumeric characters.



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Email Body Field

4. Type a + sign in the Email Subject Line or Email Body field to embed a field or property variable. Type a field or property keyword after the + sign to narrow the variables list and select a Variable from the dropdown menu to insert it. See the Email Template Variables article for more information on adding email variables, including which fields and properties are supported.

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Adding a Variable

5. Users can apply Markdown Formatting to the text within the **Email Body** field.



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Markdown Formatting

 Click the **Expand** icon under the Basic Markdown Formatting section to view a list of basic formatting commands. For more information applying formatting, see Popular Markdown Styles.

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Expand Icon

- 7. Click on a Logo option to display your company's logo in the top-left corner of the email template.
 - Use Custom Logo: Allows users to update a complete logo for use on the email template. Enter the logo's URL in the Logo Public Logo field to upload the logo.
 - The logo must be in JPEG, JPG, or PNG format.
 - The URL must end in .jpeg, .jpg, or .png.



• The dimensions of the logo are 150 x 50 px.

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• Use Organization Logo: Allows users to use the organization logo to brand the email template. Please refer to the Using an Organization Logo for Branding Email Templates article for further information.

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User Organization Logo

8. Scroll to the **Preview** section to review the email template's appearance.



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Preview Section

9. Click the **Create** button to save you changes and create the email template.

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