

Edit or Delete a Custom Email Template

Last Modified on 10/02/2024 1:44 pm EDT

Overview

A custom email template is any template that is **not** a [default template \(Standard or Assigned\)](#). Both custom and default templates can be edited, but only custom templates can be deleted, provided they are not currently selected in a [Messaging](#) action in a workflow.

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

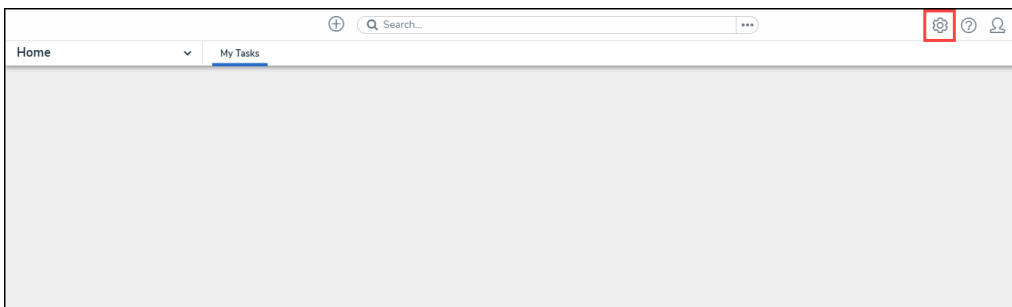
Please refer to the [Using an Organization Logo for Branding Email Templates](#) article for further information on how to use the organization logo to brand email templates.

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.

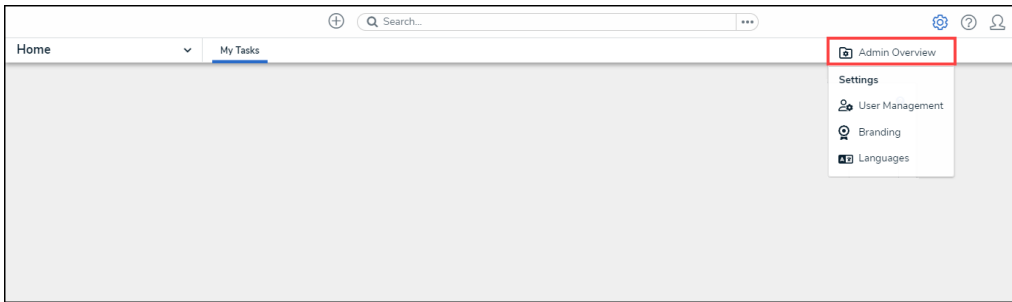
Navigation

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



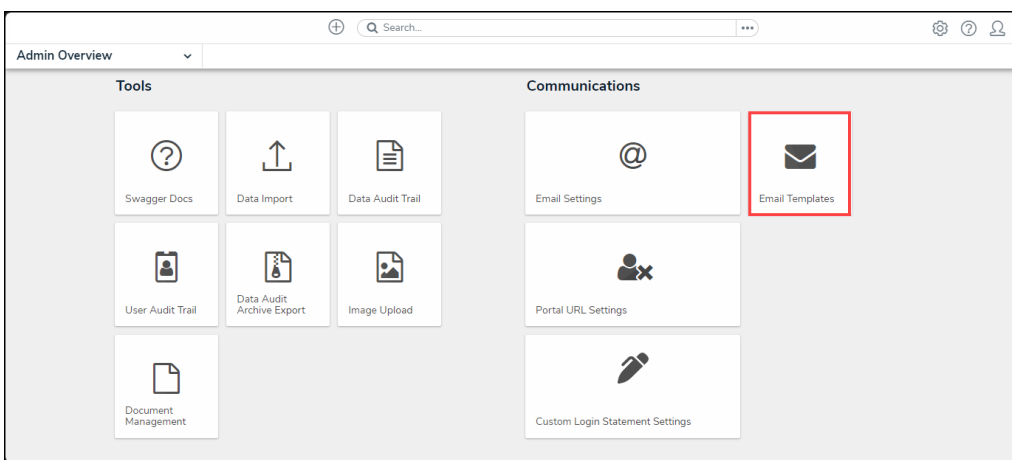
Administration Icon

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



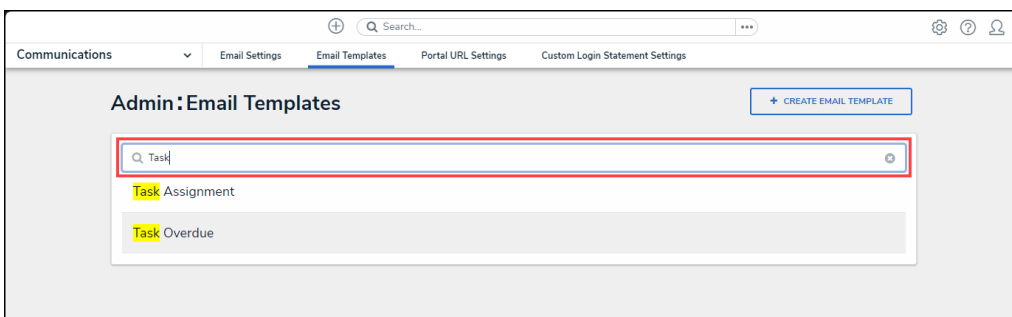
Admin Overview Link

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



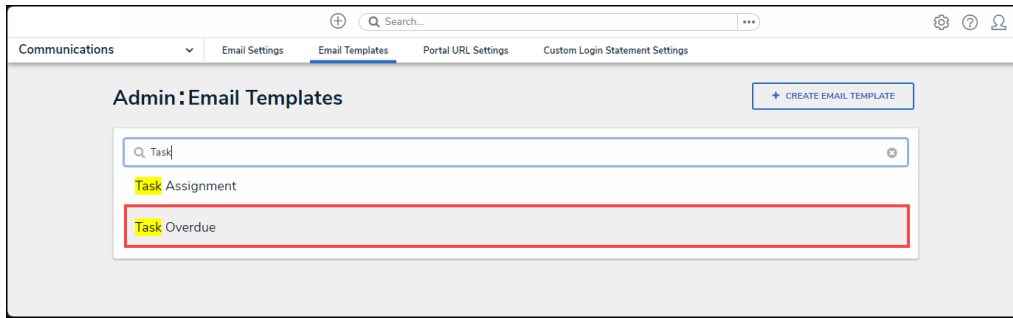
Email Templates Tile

- From the **Admin: Email Template** screen, enter an email template name in the **Search** field to narrow the search results.



Search Field

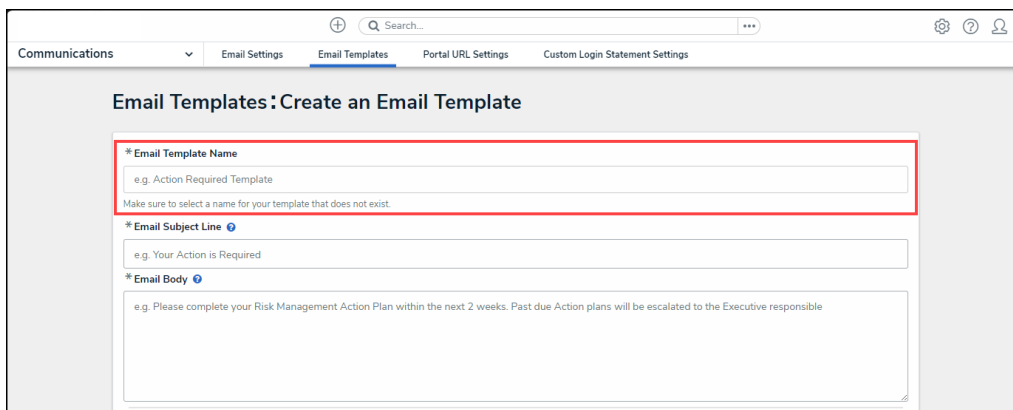
- Click on an **Email Template** link.



Email Template Link

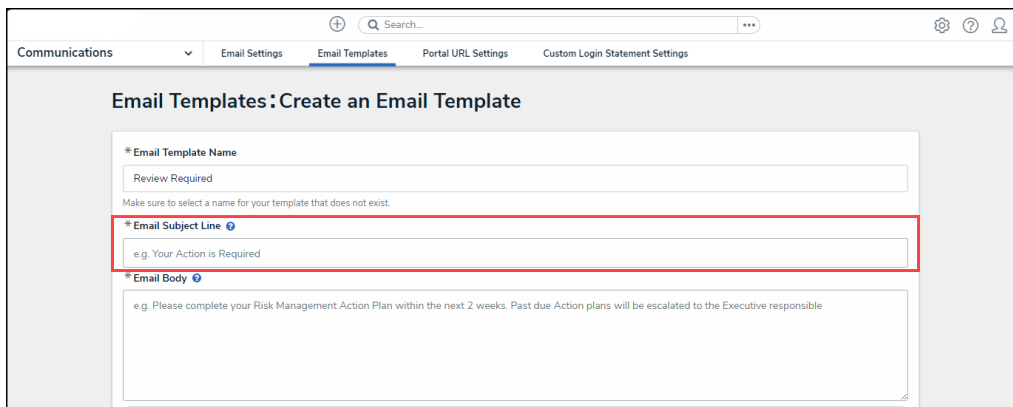
Editing a Custom Email Template

1. Enter a unique email template name in the **Email Template Name** field. An email template name cannot be use more than once.



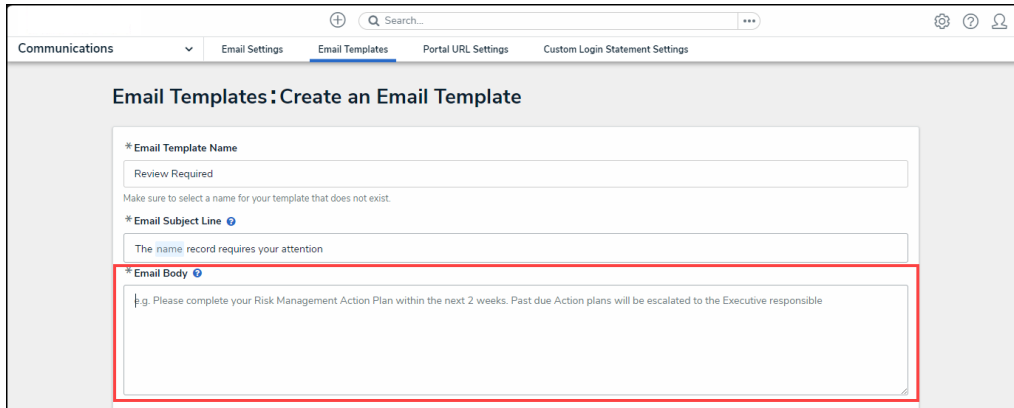
Email Template Name Field

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.



Mail Subject Line Field

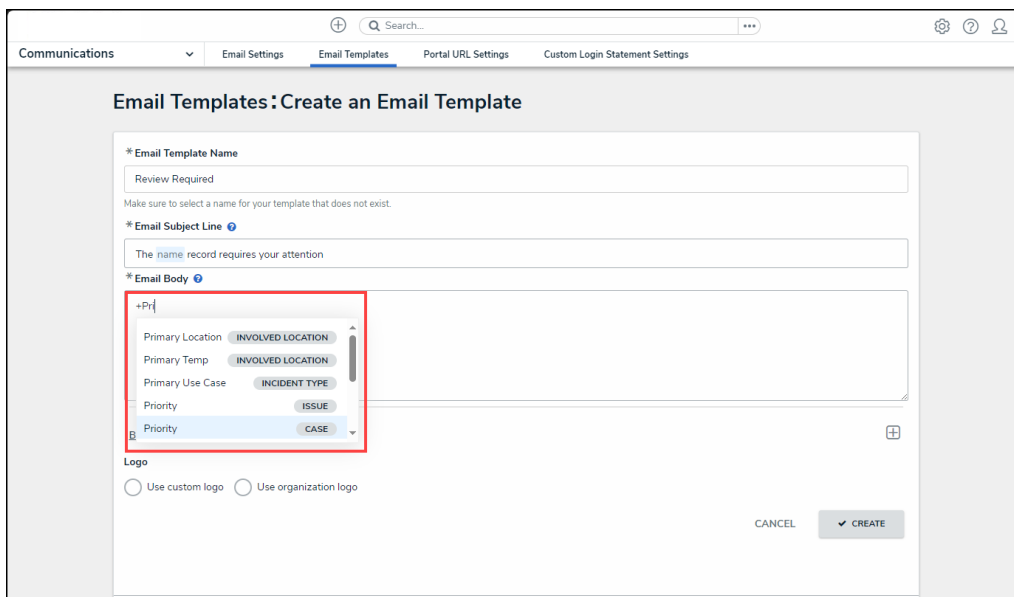
3. Enter a custom message in the **Email Body** field. The custom message entered in the **Email Body** field must be at least 10 alphanumeric characters.



The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Body' field is highlighted with a red border and contains the text: 'P.g. Please complete your Risk Management Action Plan within the next 2 weeks. Past due Action plans will be escalated to the Executive responsible'.

Email Body Field

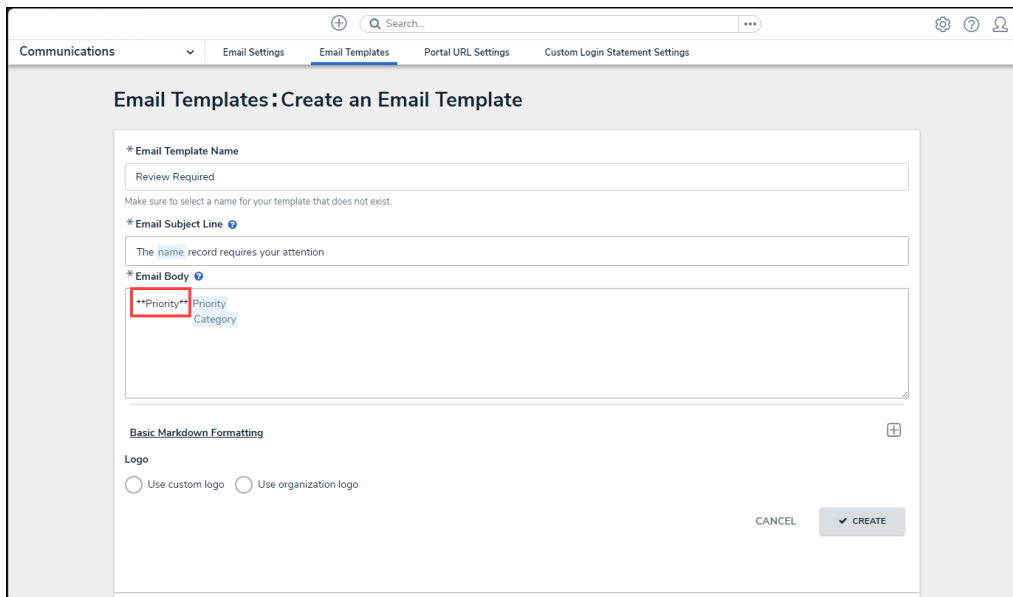
4. Type a + sign in the **Email Subject Line** or **Email Body** field to embed a field or property variable. Type a field or property keyword after the + sign to narrow the variables list and select a **Variable** from the dropdown menu to insert it. See the [Email Template Variables](#) article for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



The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Body' field is highlighted with a red border and contains a dropdown menu with the following options: Primary Location (INVOLVED LOCATION), Primary Temp (INVOLVED LOCATION), Primary Use Case (INCIDENT TYPE), Priority (ISSUE), and Priority (CASE). The 'Priority' option is selected.

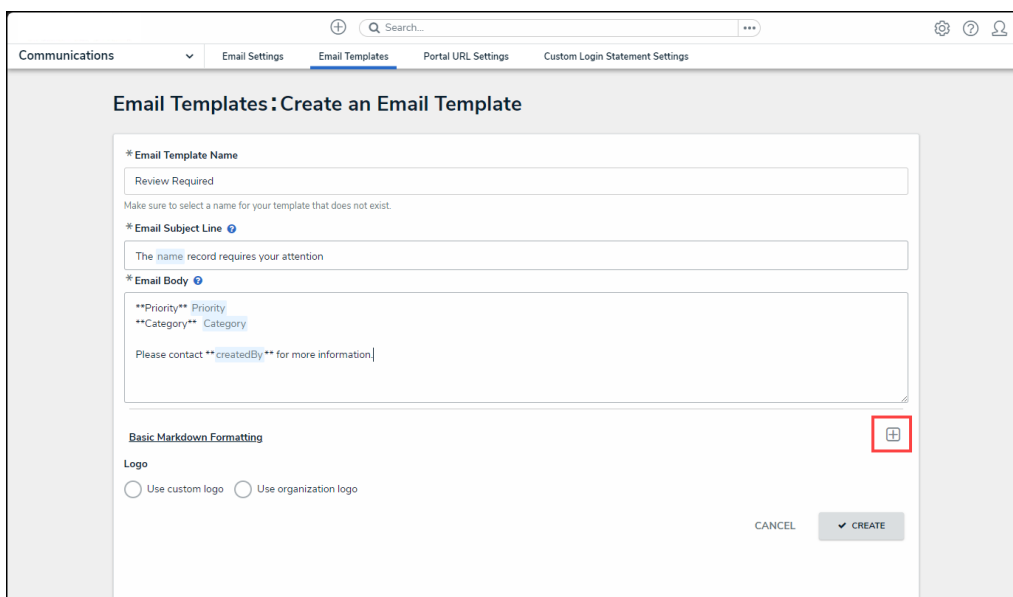
Adding a Variable

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



Markdown Formatting

6. 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](#).



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.

Communications | Email Settings | **Email Templates** | Portal URL Settings | Custom Login Statement Settings

Email Templates : Create an Email Template

*Email Template Name
Review Required
Make sure to select a name for your template that does not exist.

*Email Subject Line
The name record requires your attention

*Email Body
Priority Priority
Category Category
Please contact **createdBy** for more information.

Basic Markdown Formatting

Logo
 Use custom logo Use organization logo

Logo Public URL
Upload your company's logo to a file storage website and then paste the public URL above

CANCEL CREATE

Use Custom Logo/Logo Public URL

- **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.

KROLL | Communications | Email Settings | **Email Templates** | Portal URL Settings | Custom Login Statement Settings

Email Templates : Create an Email Template

*Email Template Name
Review Required
Make sure to select a name for your template that does not exist.

*Email Subject Line
The name record requires your attention

*Email Body
Priority Priority
Category Category
Please contact **createdBy** for more information.

Basic Markdown Formatting

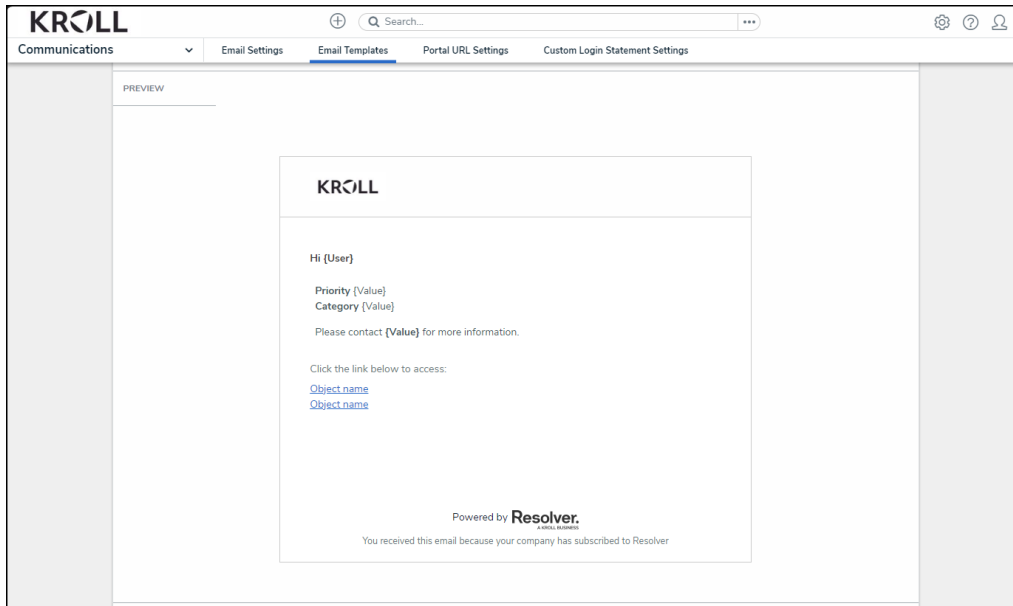
Logo
 Use custom logo Use organization logo

https://.../4839-b368-5eac80e49719.jpg

CANCEL CREATE

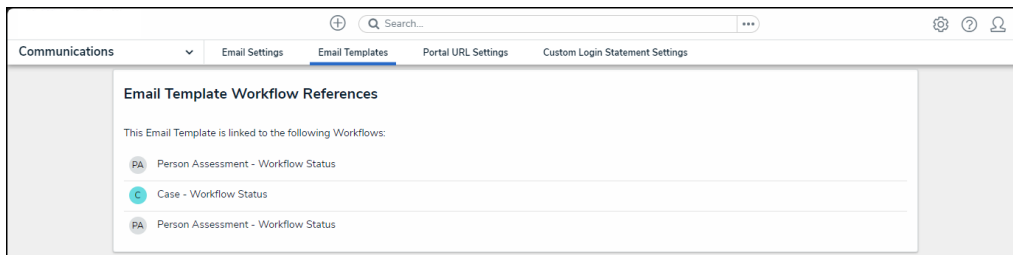
User Organization Logo

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



Preview Section

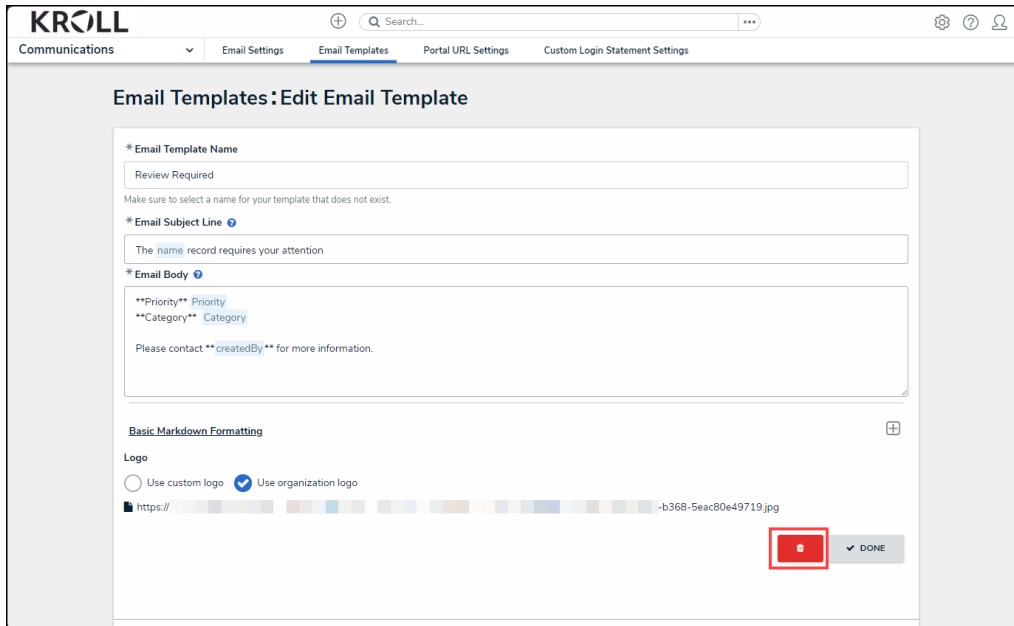
9. The **Email Template Workflow References** section will show if the email template is used in a workflow. The object type's monogram, name, and workflow name will appear in this section as a link (e.g. **[Object Type Name] - Workflow [Workflow Name]**). Clicking these links will display the related **Admin: Edit Workflow** screen.



Email Template Workflow References

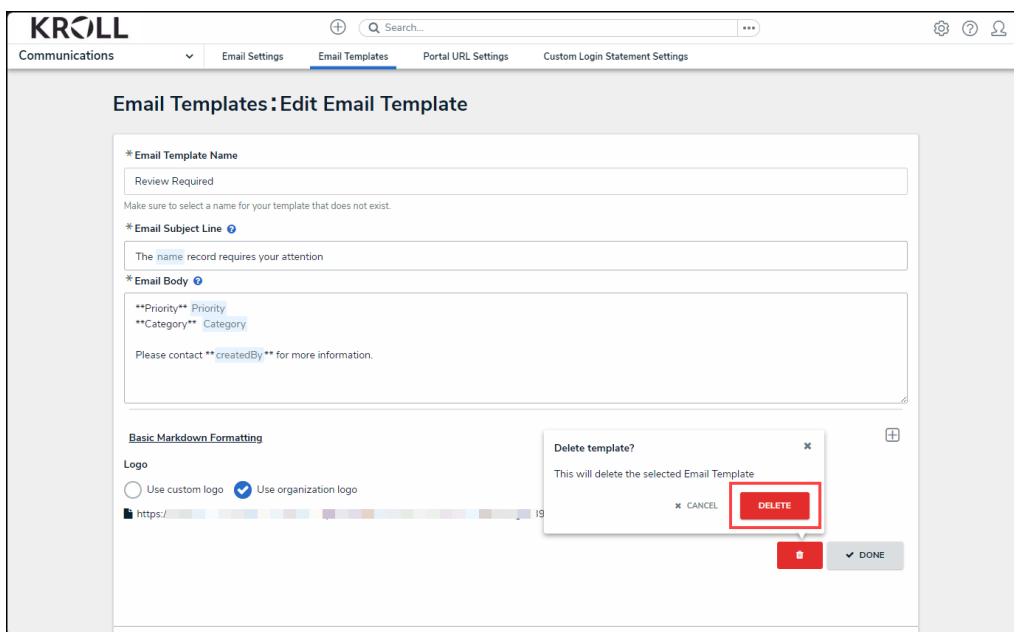
Deleting a Custom Email Template

1. From the **Email Templates: Edit Email Template** screen, click the **Delete** button.



Delete Button

2. From the **Confirmation** pop-up, click the **Delete** button to delete the email template.



Delete Button