

Email Templates

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

Create a New Custom Email Template

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

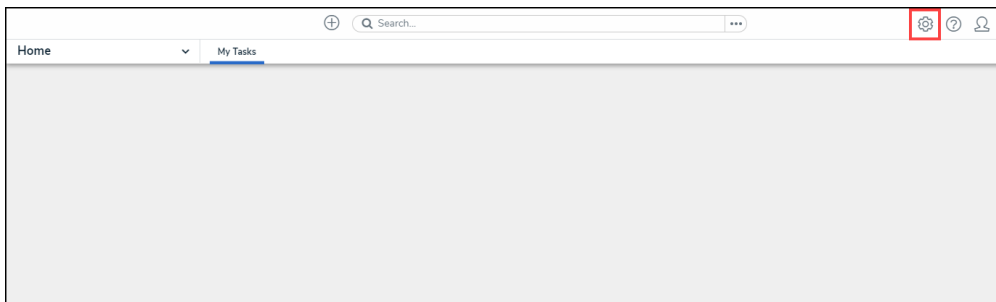
Please refer to the [Using an Organization Logo for Branding Email Templates](#) article for further information on how to use the organization logo to brand email templates.

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.

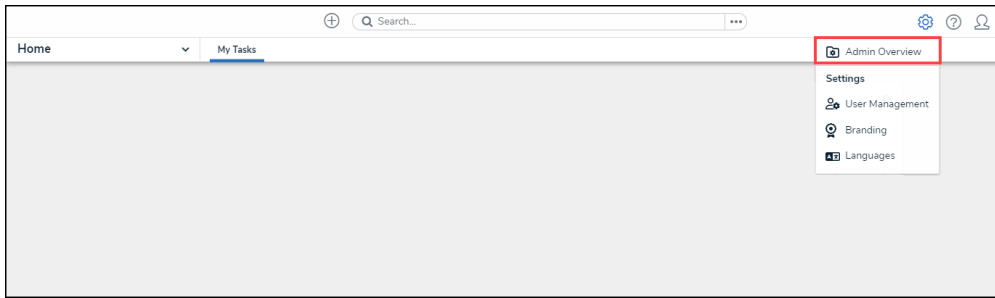
Navigation

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



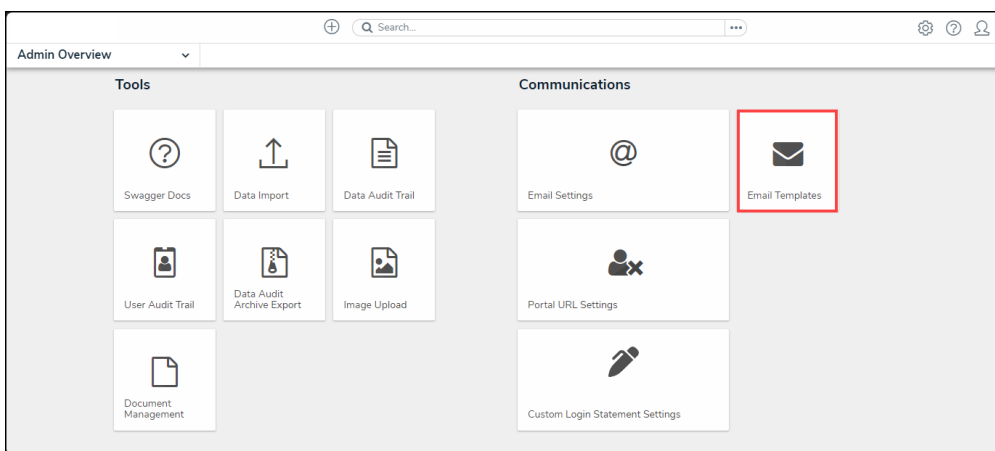
Administration Icon

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



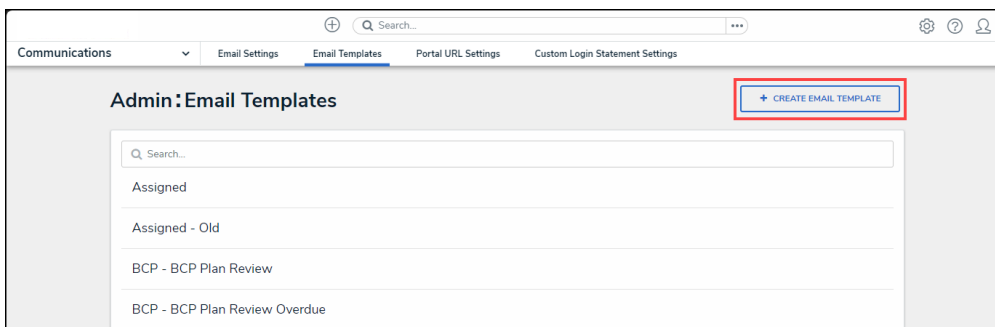
Admin Overview Link

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



Email Templates Tile

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



+ Create Email Template Button

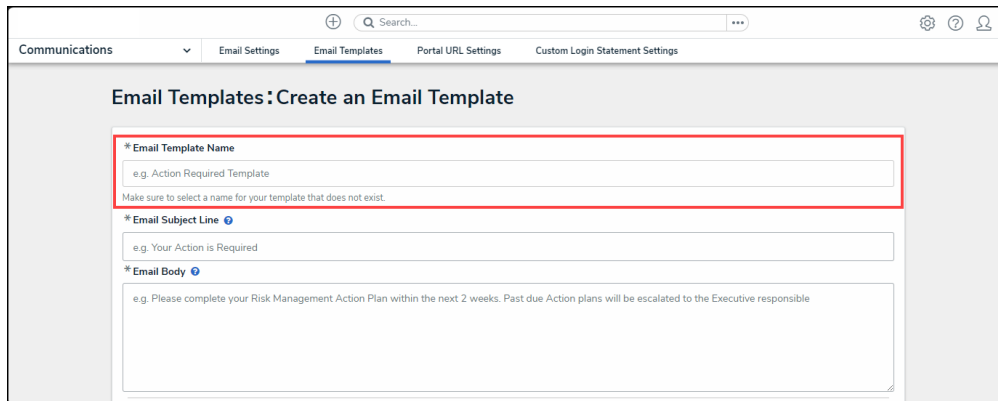


Note:

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

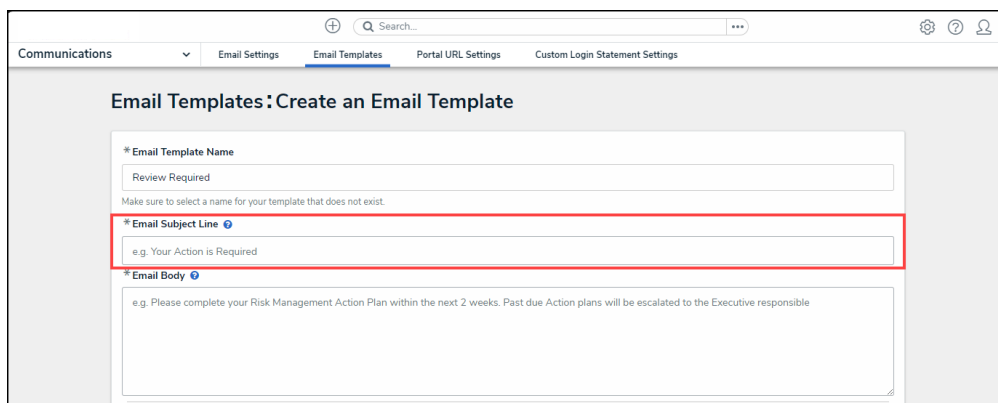
1. From the **Email Templates: Create an Email Template** screen, enter a unique email template name in the **Email Template Name** field. An email template name cannot be used more than once.



The screenshot shows the 'Email Templates: Create an Email Template' form. The form has three main input fields: 'Email Template Name', 'Email Subject Line', and 'Email Body'. The 'Email Template Name' field is highlighted with a red border and contains the text 'e.g. Action Required Template'. Below this field is a note: 'Make sure to select a name for your template that does not exist.' The 'Email Subject Line' field contains 'e.g. Your Action is Required'. The 'Email Body' field contains a longer example text: 'e.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 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.



The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Template Name' field now contains 'Review Required'. The 'Email Subject Line' field is highlighted with a red border and contains 'e.g. Your Action is Required'. The 'Email Body' field remains the same as in the previous screenshot.

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: 'g. Please complete your Risk Management Action Plan within the next 2 weeks. Past due Action plans will be escalated to the Executive responsible'.

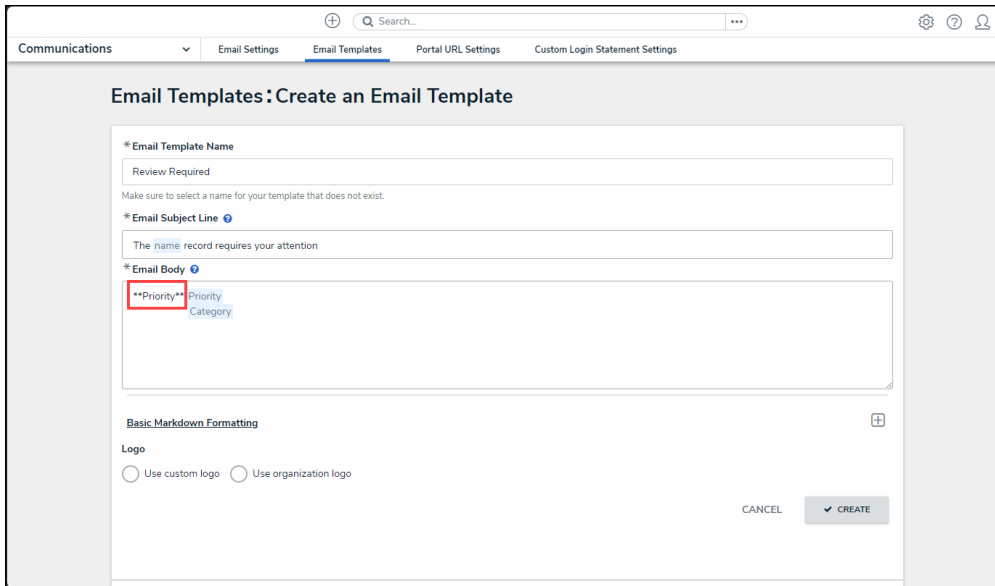
Email Body Field

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 the text '+Pri'. A dropdown menu is open below the field, showing a list of variables: Primary Location (INVOLVED LOCATION), Primary Temp (INVOLVED LOCATION), Primary Use Case (INCIDENT TYPE), Priority (ISSUE), and Priority (CASE). The 'Priority (CASE)' option is selected.

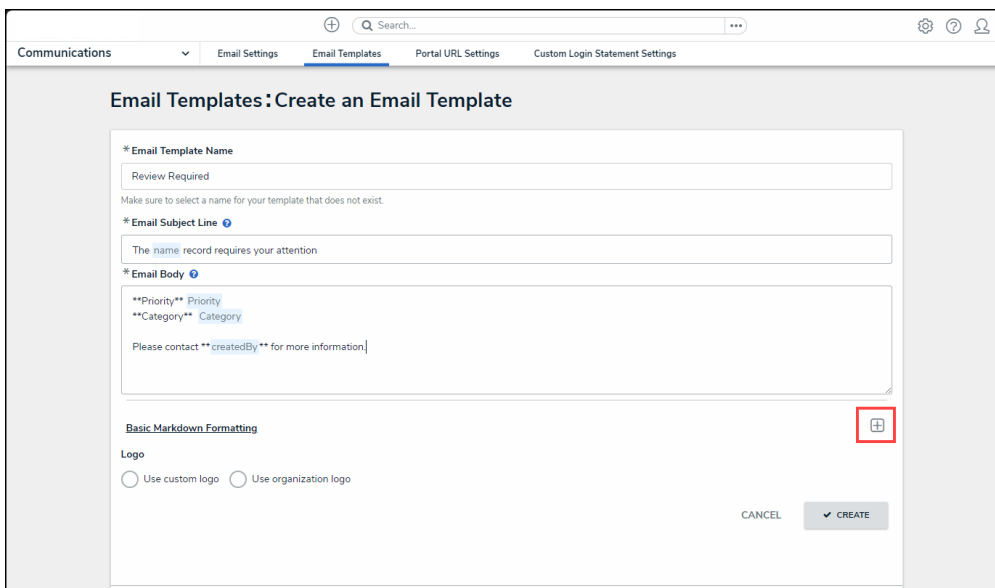
Adding a Variable

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

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 | Search...

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

Email Templates: Create an Email Template

*** Email Template Name**
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Please contact **createdBy** for more information.

Basic Markdown Formatting

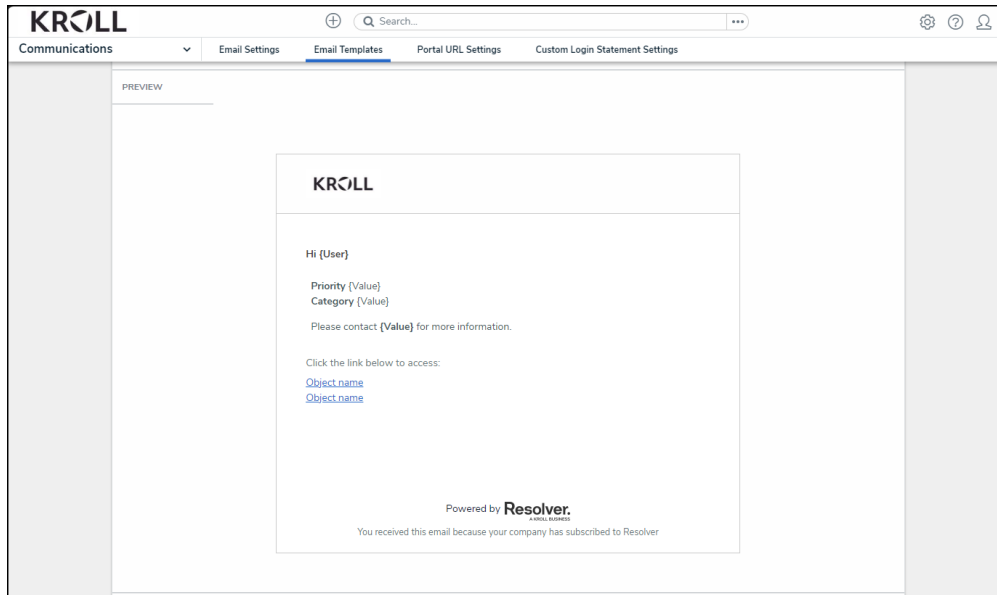
Logo
 Use custom logo Use organization logo

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

CANCEL

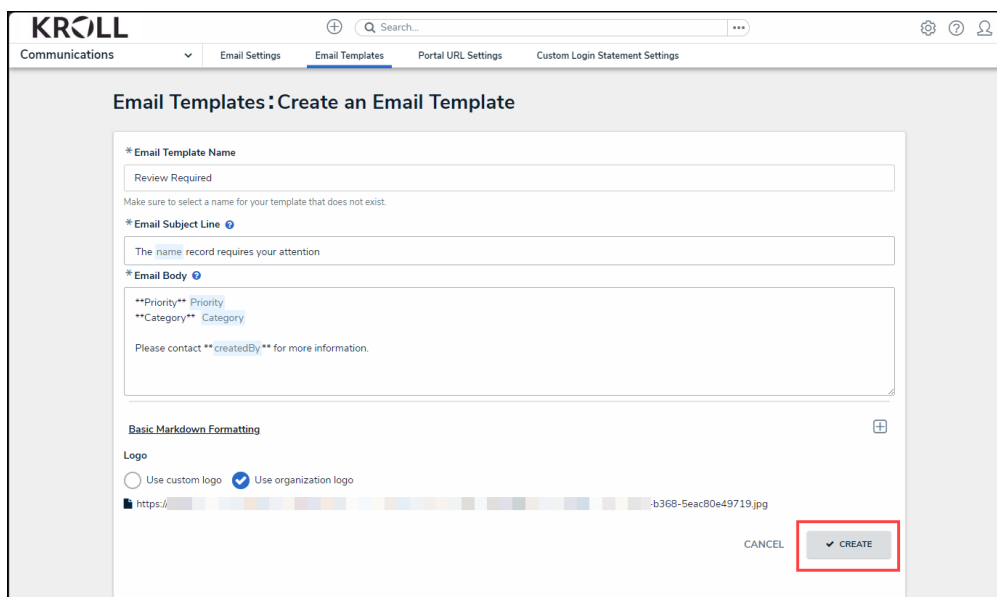
User Organization Logo

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



Preview Section

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



Create Button

Edit or Delete a Custom Email Template

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

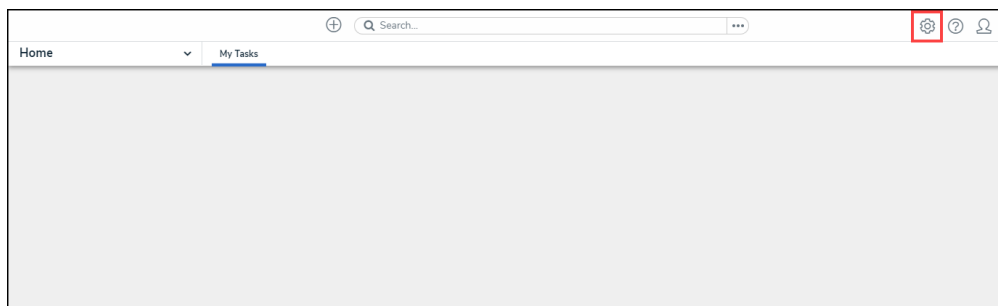
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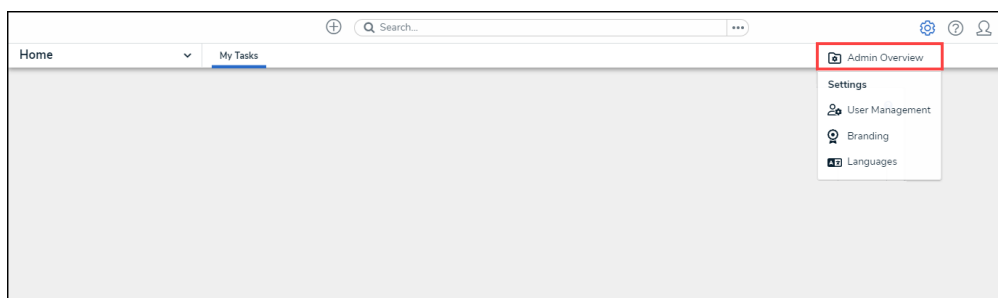
Navigation

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



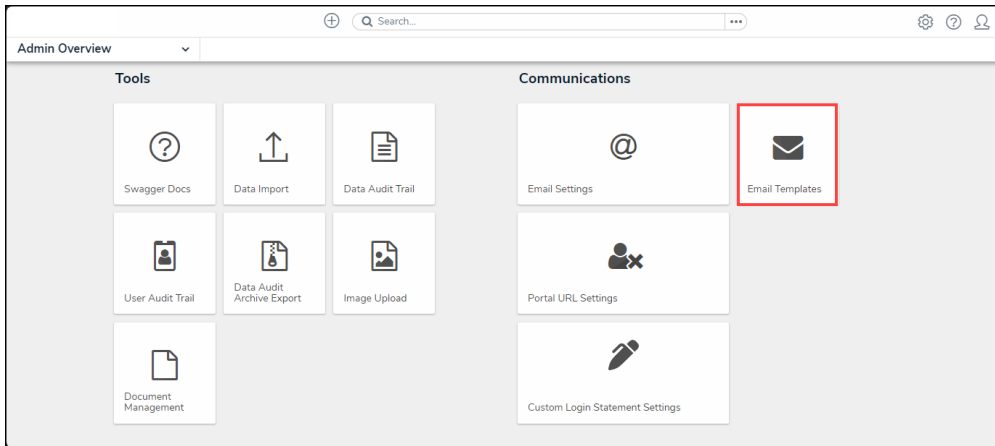
Administration Icon

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



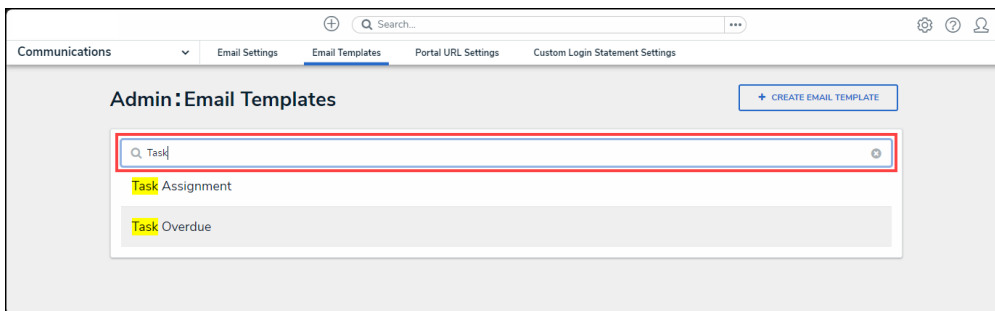
Admin Overview Link

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



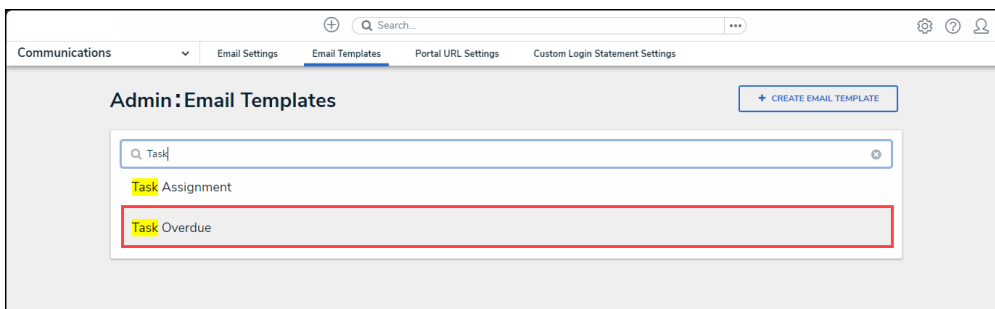
Email Templates Tile

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



Search Field

5. 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.

The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Template Name' field is highlighted with a red border. The text in the field is 'e.g. Action Required Template'. Below the field, there is a note: 'Make sure to select a name for your template that does not exist.' The other fields, 'Email Subject Line' and 'Email Body', are also visible but not highlighted.

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.

The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Subject Line' field is highlighted with a red border. The text in the field is 'e.g. Your Action is Required'. The other fields, 'Email Template Name' and 'Email Body', are also visible but not highlighted.

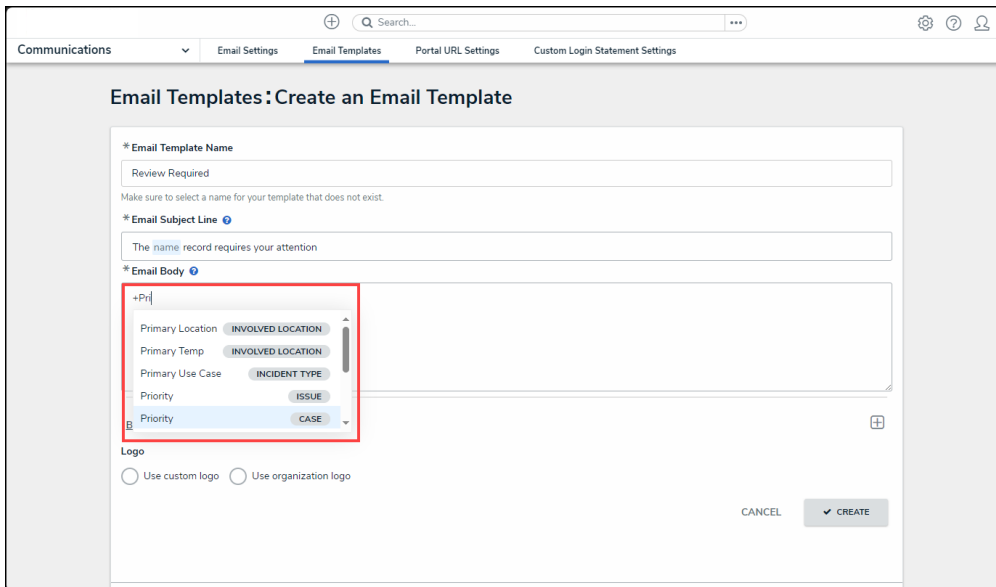
Mail Subject Line Field

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. The text in the field is 'e.g. Please complete your Risk Management Action Plan within the next 2 weeks. Past due Action plans will be escalated to the Executive responsible'. The other fields, 'Email Template Name' and 'Email Subject Line', are also visible but not highlighted.

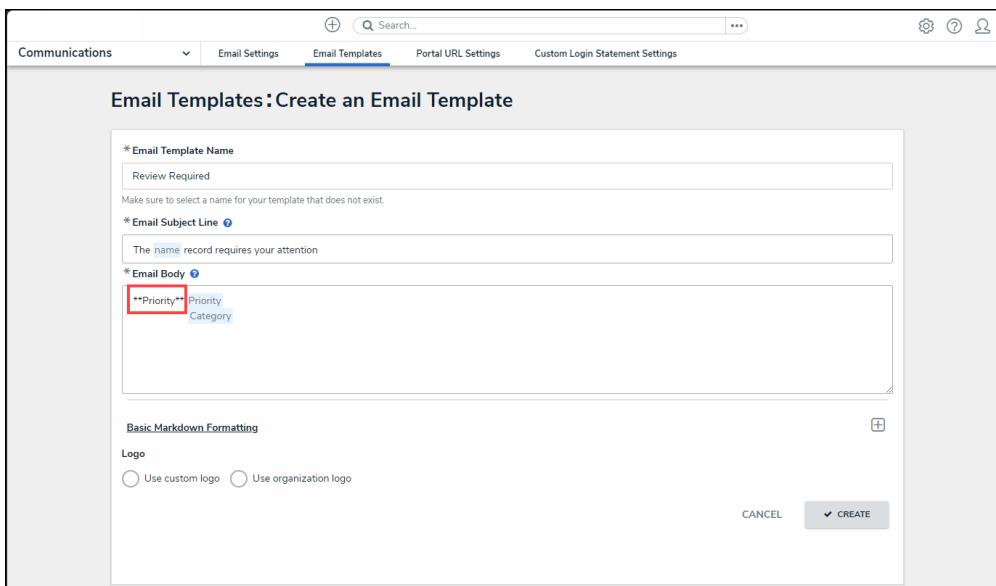
Email Body Field

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.



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](#).

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

CANCEL

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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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

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.

KRÖLL Search...
Communications | Email Settings | **Email Templates** | Portal URL Settings | Custom Login Statement Settings

Email Templates: Create an Email Template

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

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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.

KRÖLL Search...
Communications | Email Settings | **Email Templates** | Portal URL Settings | Custom Login Statement Settings

PREVIEW

KRÖLL

Hi {User}

Priority {Value}
Category {Value}

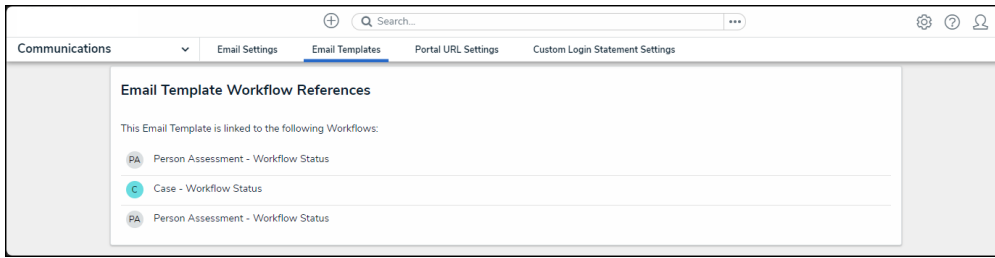
Please contact {Value} for more information.

Click the link below to access:
[{Object name}](#)
[{Object name}](#)

Powered by **Resolver.**
You received this email because your company has subscribed to Resolver

Preview Section

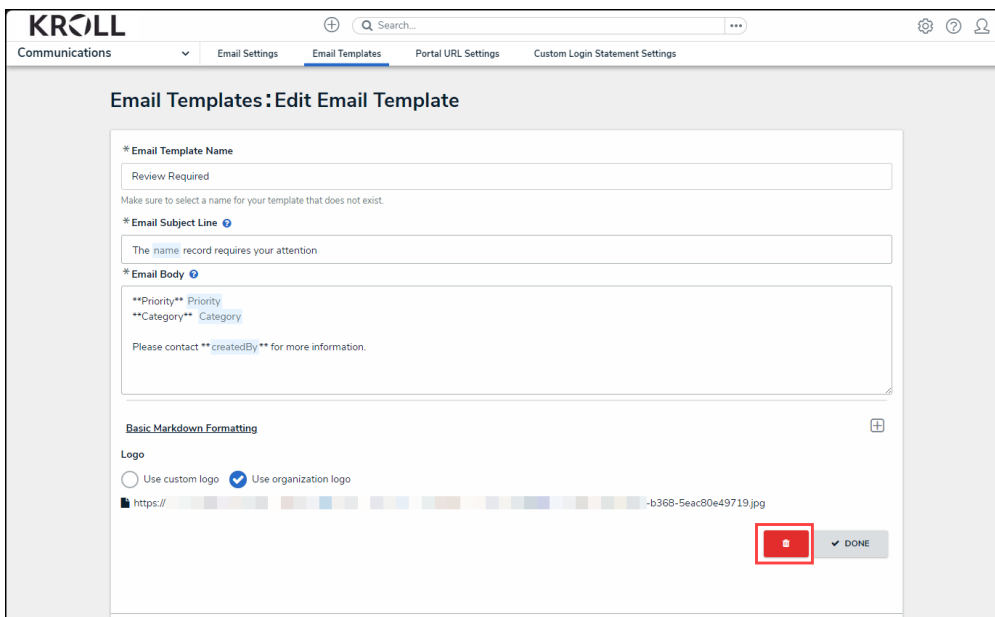
9. The **Email Template Workflow References** section will show if the email template is used in a workflow. The object type's monogram, name, and workflow name will appear in this section as a link (e.g. [**Object Type Name**] - **Workflow [Workflow Name]**). Clicking these links will display the related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



Email Template Workflow References

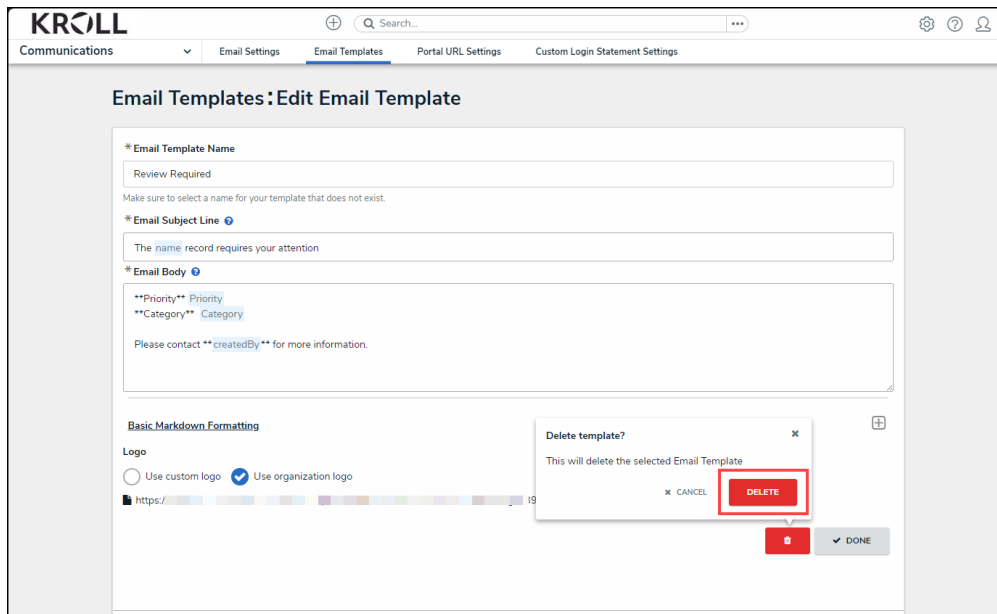
Deleting a Custom Email Template

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

Edit the Default (Standard or Assigned) Email Templates

Overview

By default, every organization has two email templates:

- **Standard:** Advises users that there are one or more objects that require attention.
- **Assigned:** Advises users that one or more objects have been assigned to them.

These templates cannot be deleted, however, all fields in the templates can be edited, including the template name.



Note:

Each field in an email template can be editing, because of this the default template within your organization may have been renamed.

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

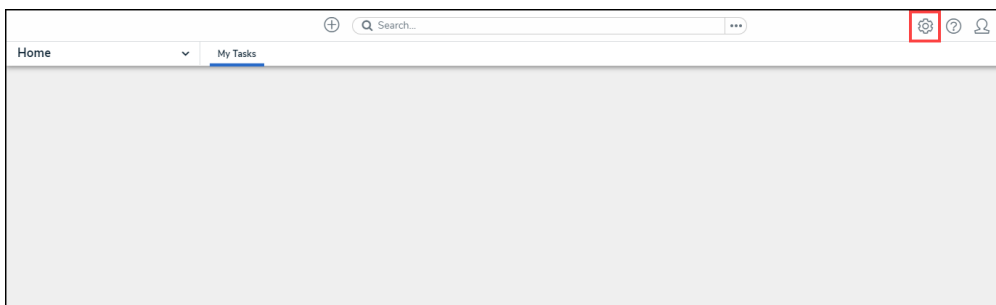
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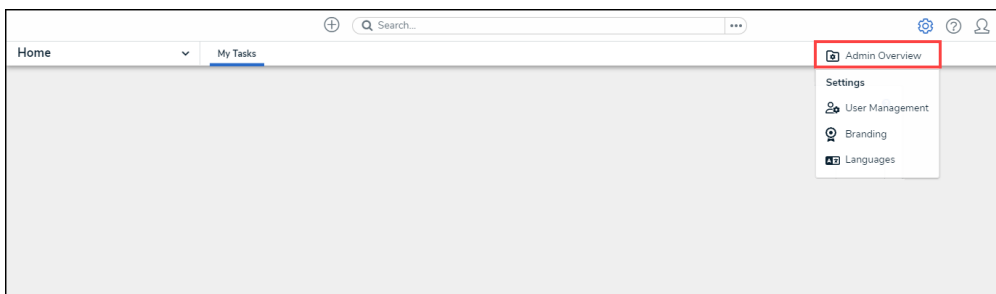
Navigation

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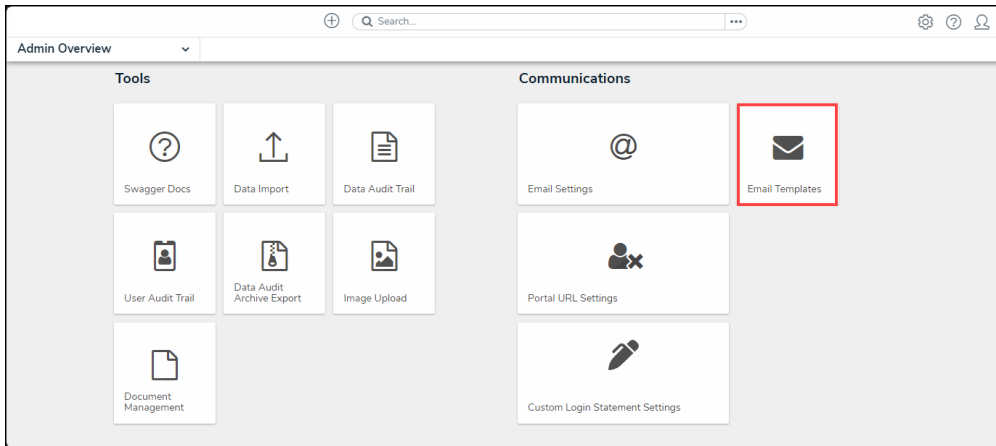
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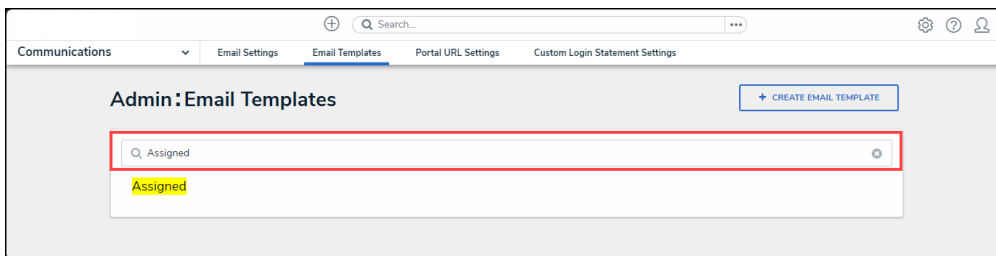
Admin Overview Link

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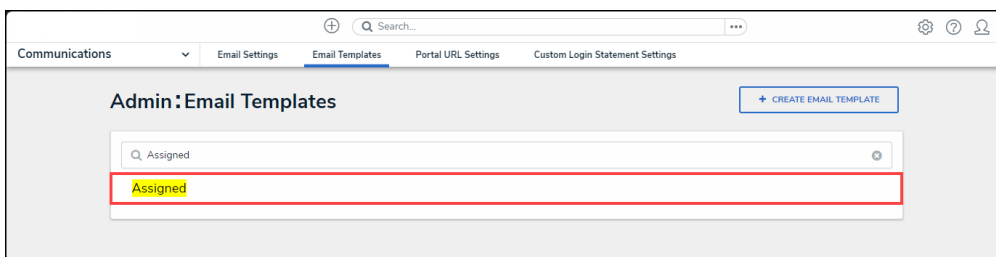
Email Templates Tile

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



Search Field

5. Click on the **Standard** or **Assigned Email Template** link.



Email Template Link

Edit the Default 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.

The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Template Name' field is highlighted with a red border. The text in the field is 'e.g. Action Required Template'. Below the field, there is a note: 'Make sure to select a name for your template that does not exist.' The 'Email Subject Line' field contains 'e.g. Your Action is Required' and the 'Email Body' field contains 'e.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 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.
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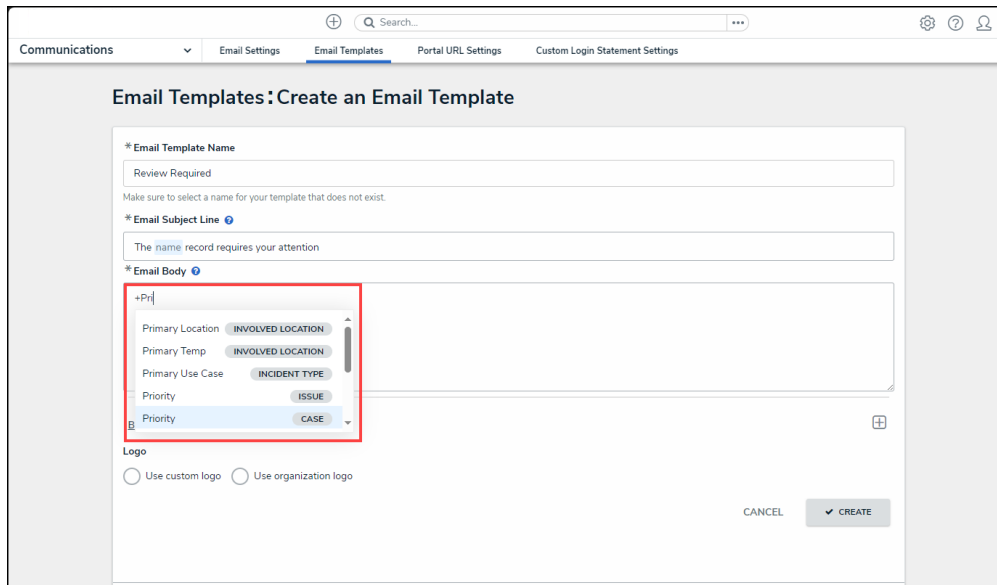
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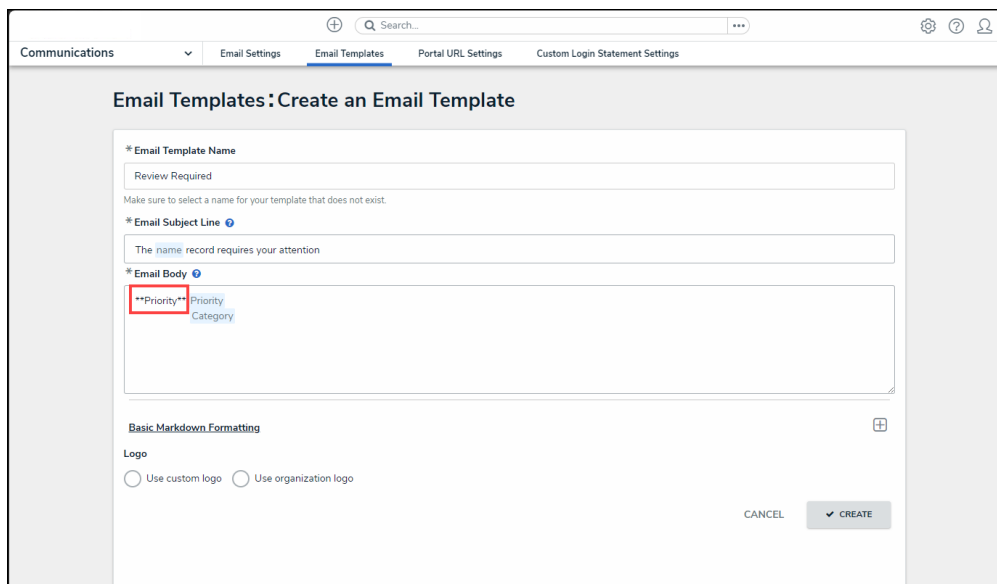
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Adding a Variable

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Markdown Formatting

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Basic Markdown Formatting +

Logo
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CANCEL

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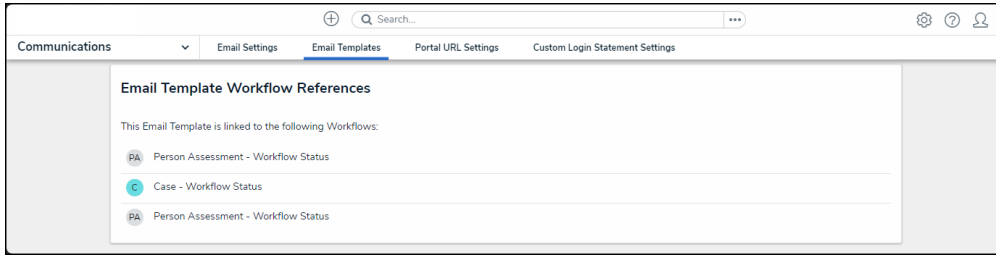
Templates article for further information.

User Organization Logo

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Preview Section

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