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

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.

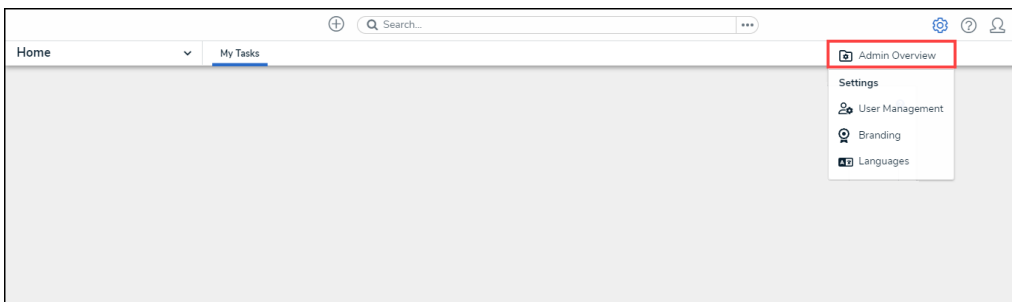Please refer to the Email Template Variables article for more information on adding email variables.

Navigation

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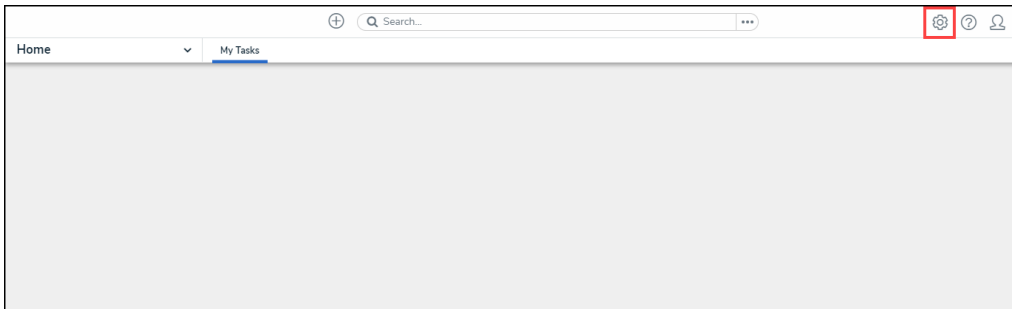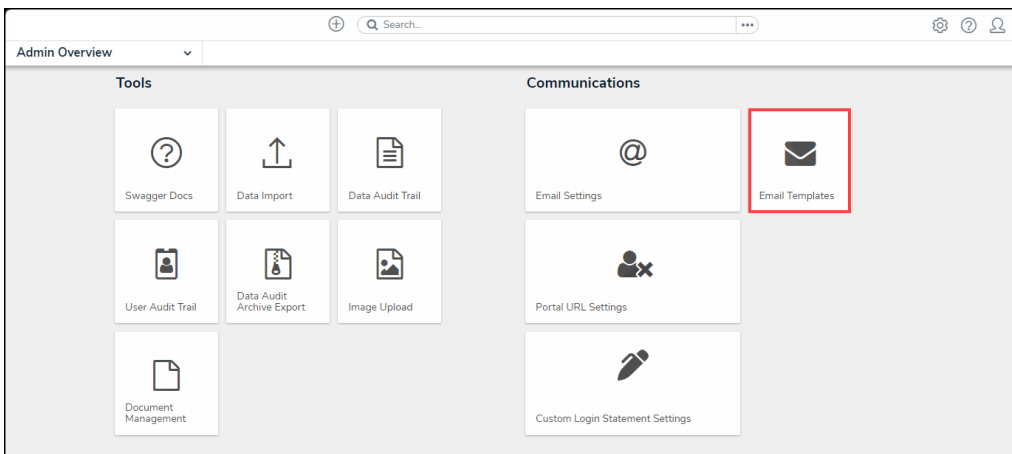
Administration Icon

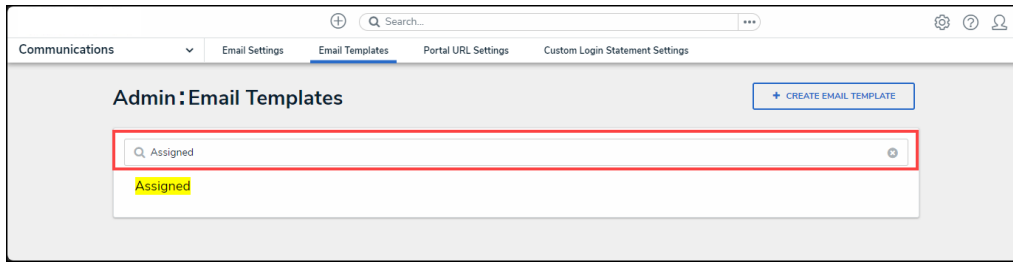2. From the **Administration Settings** menu, click the **Admin Overview** link.

Admin Overview Link

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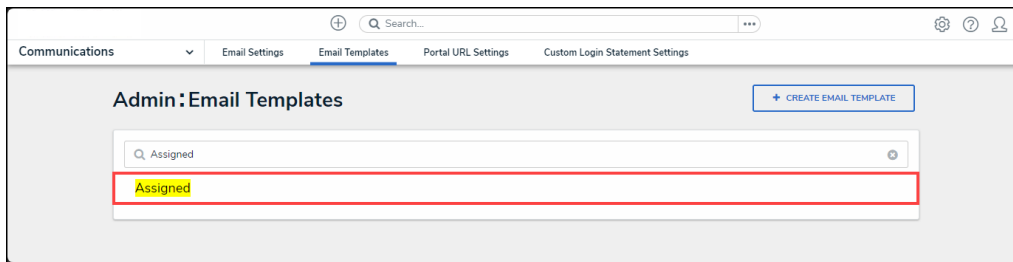

Email Templates Tile

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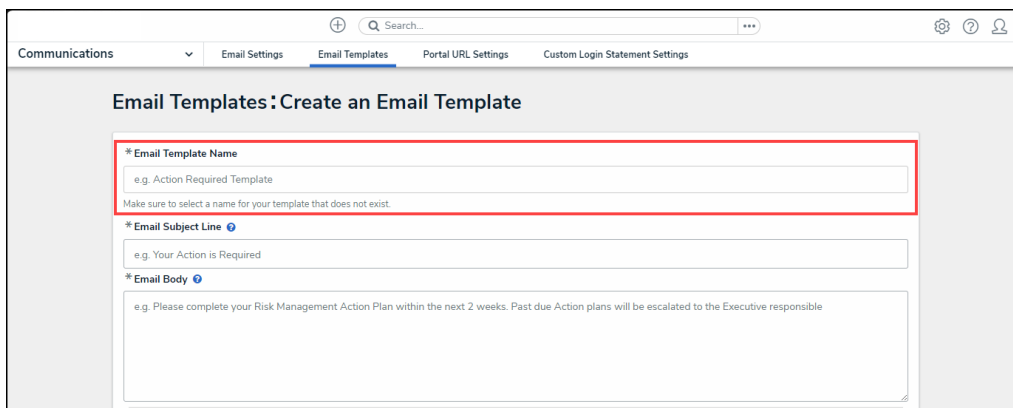
Search Field

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.

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 **Emal Body** field must be at least 10 alphanumeric characters.

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.

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.

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.

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