

Create a New Custom Email Template

Last Modified on 12/22/2021 1:41 pm EST

To create a new email template:

- Click Create Email Template to display the Create an Email Template page. Note that
 all organizations have two default templates that will appear on this page. See Edit the
 Default (Standard or Assigned) Templates for more information.



The **Email Templates** settings page.

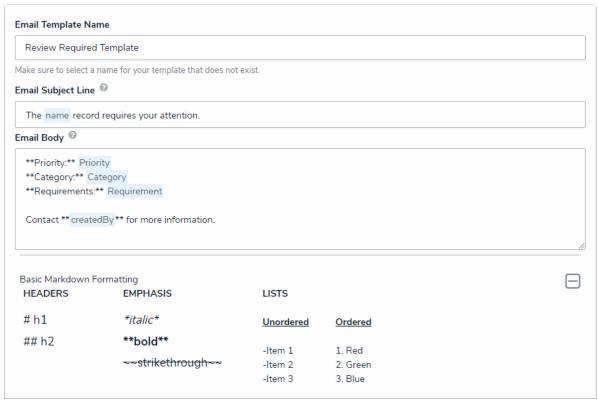
- 3. Enter a name for the template in the **Email Template Name** field, ensuring the name has not already been assigned to another template.
- 4. Enter a subject line in the Email Subject Line field. This line must be a minimum of 5 alphanumeric characters. To automatically populate the name of your Resolver Core organization in this field using a variable, alone, or with additional text, enter {orgName}. The {orgName} variable is case-sensitive.
- 5. Enter a custom message in the **Email Body** field. This message will appear above the links to the relevant objects and requires a minimum of 10 alphanumeric characters.
- 6. Optional: To embed a field or property variable, type + in the Email Subject Line or Email Body field, begin typing a field or property name to narrow down the search results, then click the variable to add it to the template. See the Email Template Variables article for more information on adding email variables, including which fields and properties are supported.



Variables in an email template.



7. **Optional:** Apply styling to a custom message or variable(s) in the **Email Body** field. To view basic styles, click the icon in the **Basic Markdown Formatting** section. For more information applying formatting, see Popular Markdown Styles.



A new email template with Markdown formatting and variables.

- 8. **Optional:** To display your company's logo in the top-left corner of the template, type or paste the public URL of the image in the **Logo** field. When inserting a custom logo in an email template, note that:
 - The logo must be saved in JPEG, JPG, or PNG format.
 - The image URL must end in .jpeg, .jpg, or .png. If the URL does not end in one of these file extensions, the **Logo** field will display an error.
 - The ideal dimensions of the logo are 150 x 50 px. If the image is larger or smaller, it will be reduced or enlarged in the template.

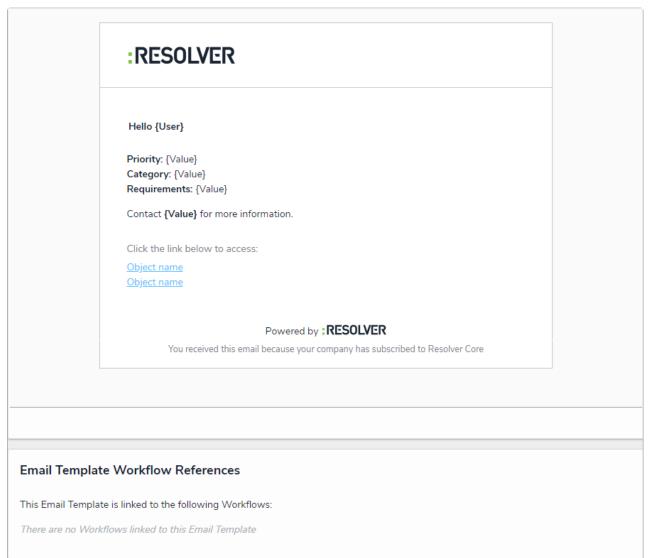


The Logo field. If the URL does not end in a .jpg, .jpeg, or .png, an error will be displayed.

Click Create to save your changes and view the Edit Email Template page, where you
can view a preview of the template, make changes to any of the fields, and view a list of
workflows associated with the template in the Email Template Workflow
References section.



If the email template is being 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 **Edit Workflow** page.



The Edit Email Template page displaying a preview of the email and associated workflows, if any.