

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

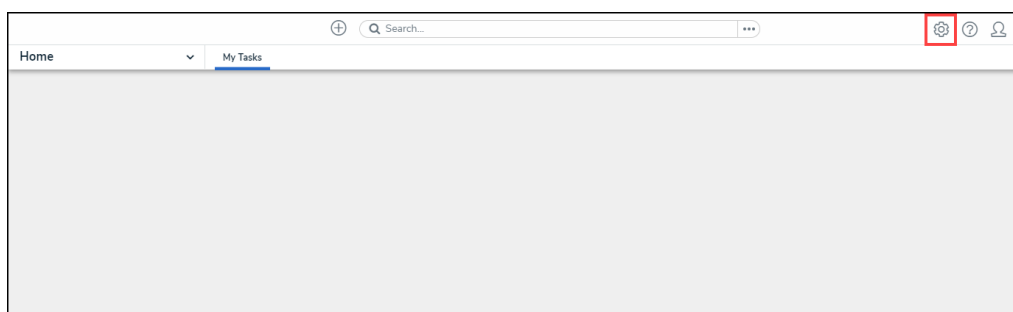
Please refer to the [Using an Organization Logo for Branding Email Templates](#) article for further information on how to use the organization logo to brand email templates.

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.

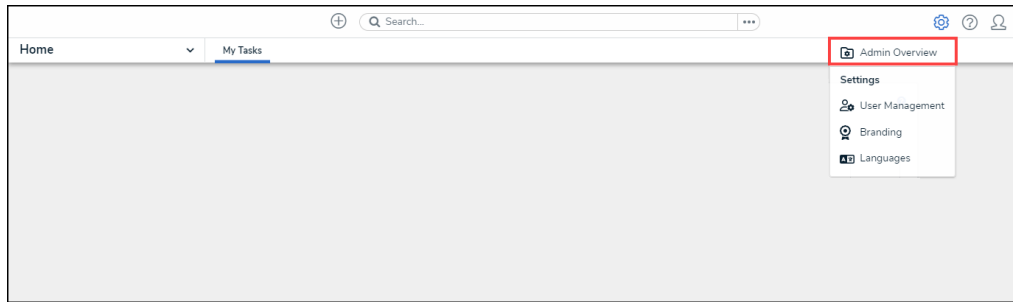
Navigation

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



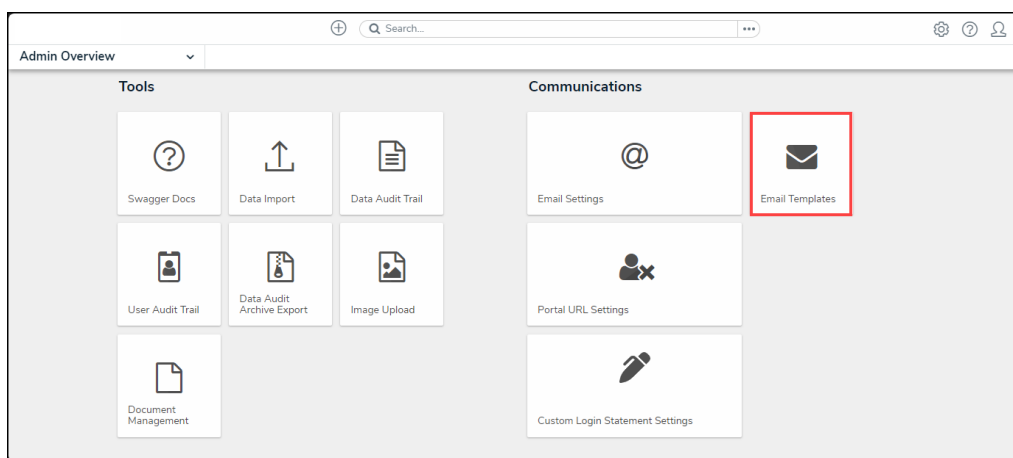
Administration Icon

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



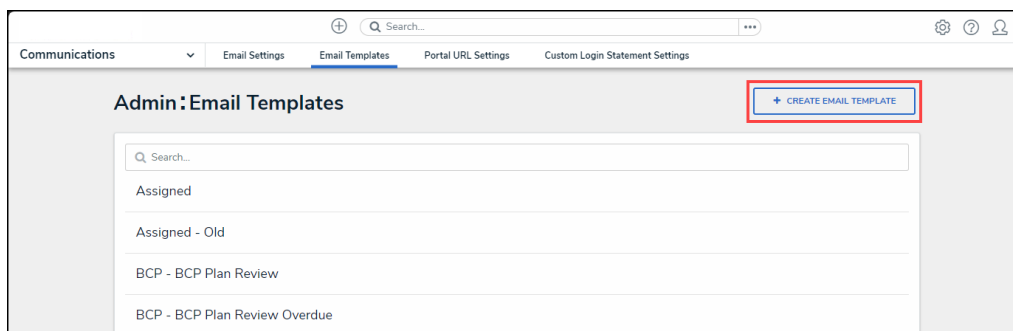
Admin Overview Link

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



Email Templates Tile

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



+ Create Email Template Button

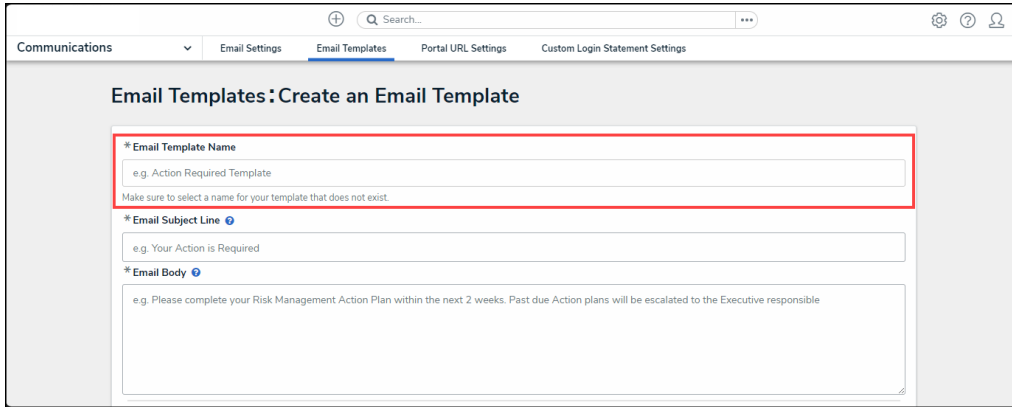


Note:

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.

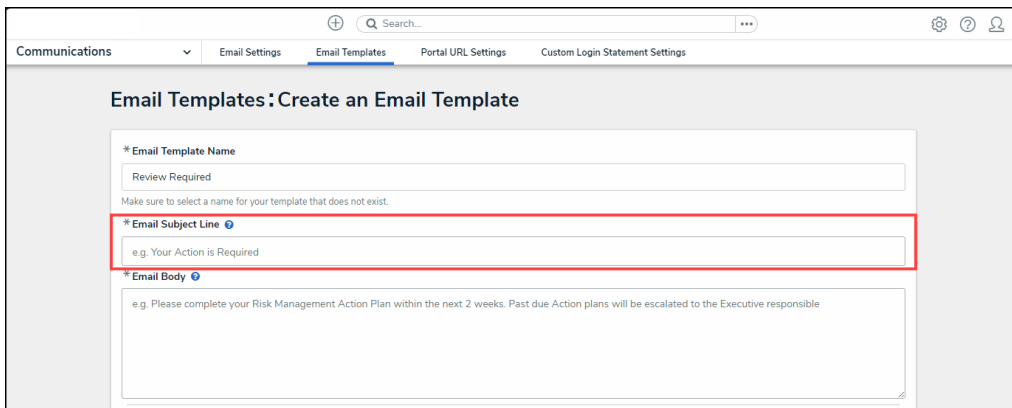


The screenshot shows the 'Email Templates: Create an Email Template' form. The 'Email Template Name' field is highlighted with a red box. The form includes the following fields:

- * Email Template Name**: e.g. Action Required Template. A note below states: 'Make sure to select a name for your template that does not exist.'
- * Email Subject Line**: e.g. Your Action is Required.
- * Email Body**: 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 Subject Line' field is highlighted with a red box. The form includes the following fields:

- * Email Template Name**: Review Required. A note below states: 'Make sure to select a name for your template that does not exist.'
- * Email Subject Line**: e.g. Your Action is Required.
- * Email Body**: 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.

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.

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** ⓘ
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 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.

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** ⓘ
+Pr

Primary Location INVOLVED LOCATION
Primary Temp INVOLVED LOCATION
Primary Use Case INCIDENT TYPE
Priority ISSUE
Priority CASE

Logo
☐ Use custom logo ☐ Use organization logo

CANCEL CREATE

Adding a Variable

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

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

Basic Markdown Formatting (+)

Logo
☐ Use custom logo ☐ Use organization logo

CANCEL **CREATE**

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](#).

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

Please contact `**createdBy**` for more information|

Expand Icon

- 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.

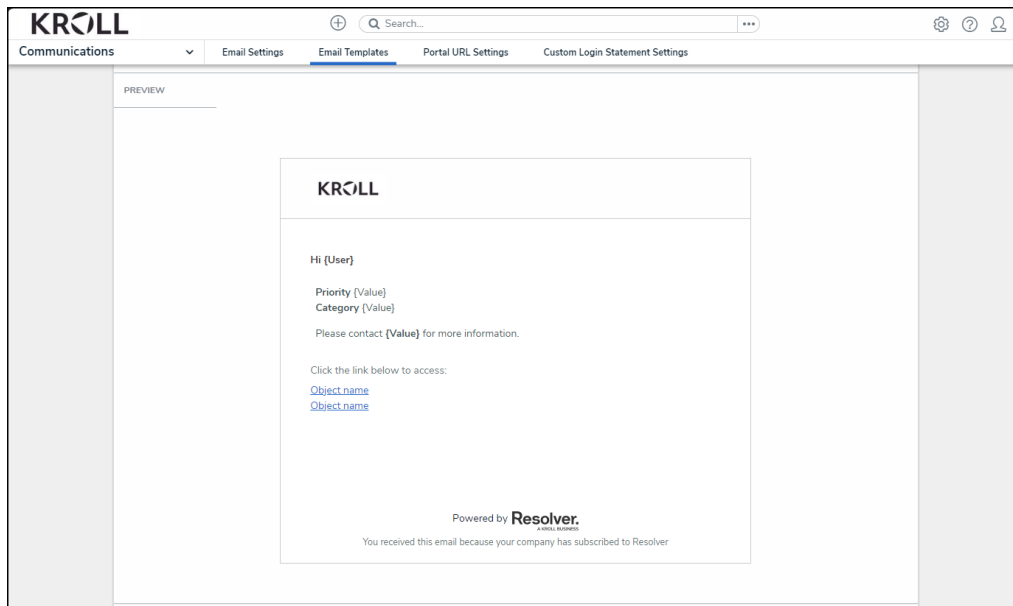
- The dimensions of the logo are 150 x 50 px.

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

A screenshot of the KROLL web application interface showing the 'Email Templates: Create an Email Template' form. The top navigation bar is the same as in the previous image. The main content area has a title 'Email Templates: Create an Email Template'. The form includes several sections: '* Email Template Name' with a text input field containing 'Review Required' and a note 'Make sure to select a name for your template that does not exist.'; '* Email Subject Line' with a text input field containing 'The {name} record requires your attention'; '* Email Body' with a text area containing '**Priority** Priority', '**Category** Category', and 'Please contact **createdBy** for more information.'; 'Basic Markdown Formatting' with a '+' icon; and 'Logo' with two radio buttons: 'Use custom logo' (unselected) and 'Use organization logo' (selected). Below the logo section is a row of color swatches and a URL 'https://b368-5eac80e49719.jpg'. At the bottom right of the form are two buttons: 'CANCEL' and 'CREATE' (which is highlighted with a red rectangle).

Create Button