

Using an Organization Logo for Branding Email Templates

Last Modified on 10/02/2024 1:48 pm EDT

Overview

Administrators can use the organization logo for branding email templates.

Customer Administrators no longer have to do email template configuration work for sent emails to be branded.

User Account Requirements

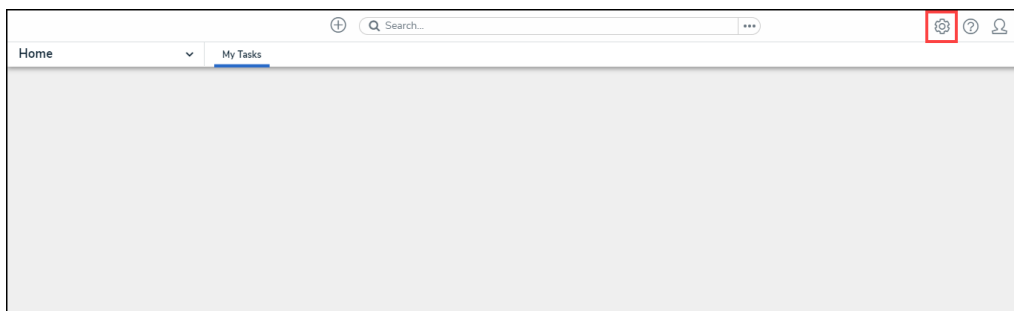
The user must have Administrator permissions in order to access the ***Admin: Email Template*** screen.

Related Information/Setup

Please see the [Adding an Organization Logo](#) article for more information on how to add an organization logo.

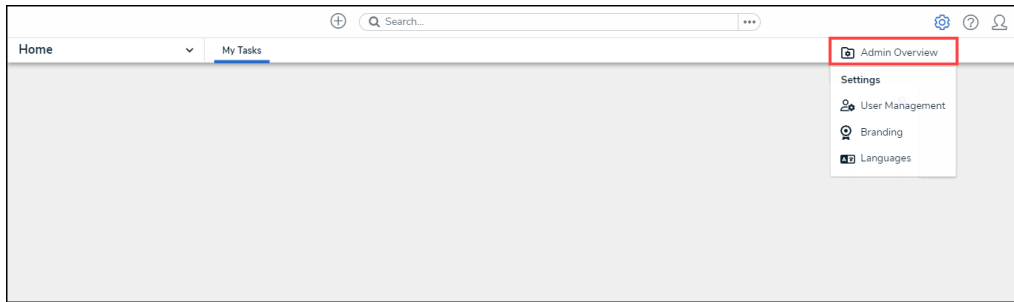
Navigation

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



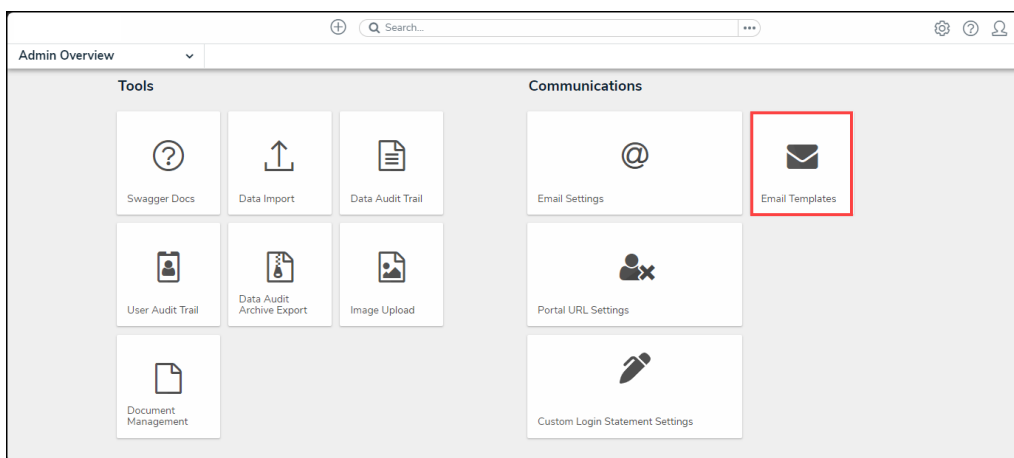
Administration Icon

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



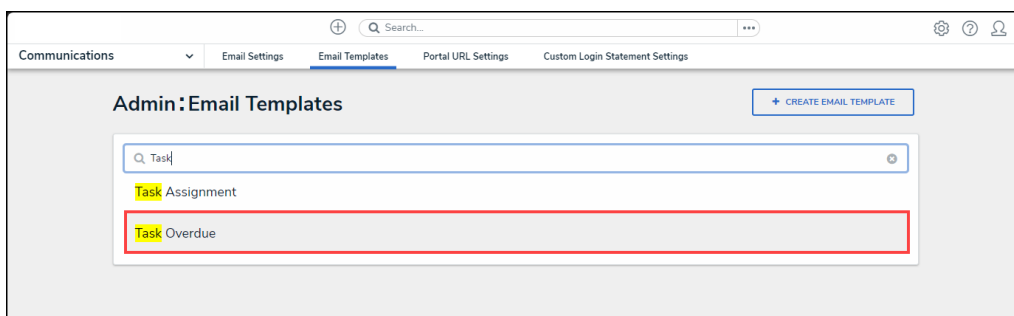
Admin Overview Link

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



Email Templates Tile

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



Email Template Link

Using an Organization Logo for Branding Email Template

- From the **Email Templates: Edit Email Templates** screen, scroll to the **Logo** section.

The screenshot shows the 'Email Templates: Edit Email Template' page. The form has three main sections: 'Email Template Name' with the value 'Task Overdue', 'Email Subject Line' with the value 'Task: name is OVERDUE', and 'Email Body' containing a markdown-formatted reminder. A red box highlights the 'Logo' section at the bottom, which includes two radio buttons: 'Use custom logo' and 'Use organization logo'. The 'DONE' button is located at the bottom right of the form.

Logo Section

2. Click the **User organization logo** radio button to use the uploaded organization logo to brand the email template. Please refer to the [Adding an Organization Logo](#) article for more information on how to add an organization logo.
3.
 - **Organization Logo is Upload Through Branding Settings:**
 - The Organization Logo's URL will be displayed.
 - The Organization Logo will appear in the **Preview** section.
 - The Organization Logo will appear on the sent email.

Email Templates: Edit Email Template

* Email Template Name
Task Overdue

Make sure to select a name for your template that does not exist.

* Email Subject Line
Task: name is OVERDUE

* Email Body

```
## The following task is now **overdue**:
&nbsp;
**Task:** name
**Due Date:** Due Date
**Assigned Date:** Assigned Date
**Related Object Name & Description:** Task Related Information
```

Please use the link to complete the task as soon as possible. Subsequent reminders will continue to be sent until the task is completed or reassigned.

Basic Markdown Formatting

Logo
☐ Use custom logo ☒ Use organization logo
 https://resolver-core-sandbox-sandbox-upload.s3.ca-central-1.amazonaws.com/org_3532/b35e98db-2913-46c9-ba99-eafa4a338767.png

PREVIEW



Hi {User}

The following task is now overdue:

Task: {Value}
Due Date: {Value}
Assigned Date: {Value}
Related Object Name & Description: {Value}

Please use the link to complete the task as soon as possible. Subsequent reminders will continue to be sent until the task is completed or reassigned.

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

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

Organization Logo is Uploaded Through the Branding Settings

- **Organization Logo is not Uploaded Through Branding Settings:**
 - A primary alert will appear stating No organization logo has been uploaded yet. This email template will start using the organization logo as soon as it is uploaded in the Branding settings.
 - The logo section on the email template will be blank on sent emails.

Communications

Email SettingsEmail TemplatesPortal URL SettingsCustom Login Statement Settings

Email Templates:Edit Email Template

*Email Template Name

Task Overdue

Make sure to select a name for your template that does not exist.

*Email Subject Line

Task: `name` is OVERDUE

*Email Body

The following task is now **overdue**:

Task: `name`

Due Date: `Due Date`

Assigned Date: `Assigned Date`

Related Object Name & Description: `Task Related Information`

Please use the link to complete the task as soon as possible. Subsequent reminders will continue to be sent until the task is completed or reassigned.

Basic Markdown Formatting

Logo

☐ Use custom logo☒ Use organization logo

No organization logo has been uploaded yet. This email template will start using the organization logo as soon as it is uploaded in the Branding settings.

DONE

Organization Logo is not Uploaded Through the Branding Settings