

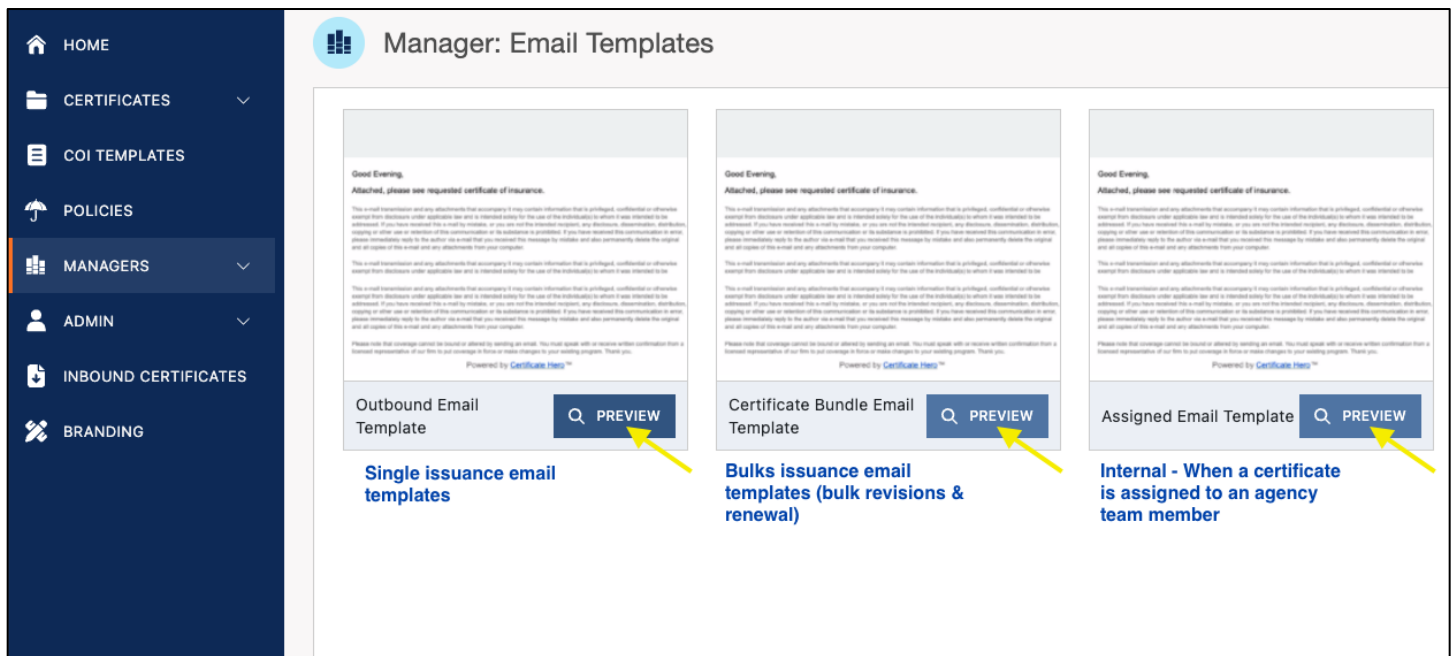
Certificate Hero Outbound Email Templates

From the left-hand “Managers” menu, select “Email Templates”.

Three separate email templates will be available to customize.

- **Outbound Email Template** – Sends when a single certificate is distributed via email.
- **Certificate Bundle Email Template** – Sends when a bulk job (bulk revisions or renewals) is distributed via email.
- **Assigned Email Template** – Sends when a certificate is assigned to an internal agency team member.

To customize the template, click the blue “Preview” button.



Manager: Email Templates

Outbound Email Template **PREVIEW**
Single issuance email templates

Certificate Bundle Email Template **PREVIEW**
Bulks issuance email templates (bulk revisions & renewal)

Assigned Email Template **PREVIEW**
Internal - When a certificate is assigned to an agency team member

Outbound Email Template and Certificate Bundle Email Template

- **Header Image** – where the image URL can be entered to customize the branding of the email. If left blank, agency branding will not appear within the email.
- **Instructions** field – where the text for the email body can be placed. (example, “Please see attached certificate of insurance”)
- **Contact Name** – where the name of the team member name or department name can be entered to direct the recipient to in the event of questions.
- **Contact Email** – where the team member or department contact email address can be entered to direct the recipient to in the event of questions.
- **Contact Phone** - where the team member or department phone number can be entered to direct the recipient to in the event of questions.
- **From** – where the desired signature name/entity can be entered.

“Email TOS” and “Footer” are not required to be filled out.

HEADER IMAGE	
<input type="text" value="URL for image that needs to be used - if blank, no branding image will populate on the email"/>	
INSTRUCTIONS	
<input type="text" value="Email template text goes here"/>	
CONTACT NAME	CONTACT EMAIL*
<input type="text" value="Default/Generic Contact Name Here"/>	<input type="text" value="Default/Generic Contact Email Here"/>
CONTACT PHONE	FROM*
<input type="text" value="Default/Generic Contact Phone Here"/>	<input type="text" value="Default/Generic Name Here for Signature"/>
EMAIL TOS	
<input type="text"/>	
FOOTER	
<input type="text"/>	
<input type="button" value="CANCEL"/> <input type="button" value="UPDATE"/>	

Assigned Email Template

- **Header Image** – where the image URL can be entered to customize the branding of the email. If left blank, agency branding will not appear within the email.

“Email TOS” and “Footer” are not required to be filled out.

HEADER IMAGE	
<input type="text" value="URL for image that need to be used - if blank, no branding image will populate on the email"/>	
EMAIL TOS	
<input type="text"/>	
FOOTER	
<input type="text"/>	
<input type="button" value="CANCEL"/> <input type="button" value="UPDATE"/>	

Example of Completed Outbound Email Template

Edit Outbound Certificates Email Template ✕

HEADER IMAGE

IMAGE URL HERE

INSTRUCTIONS

Please see the attached requested certificate of insurance.

CONTACT NAME

Certificate Hero Customer Success

CONTACT EMAIL*

customersuccess@certificatehero.com

CONTACT PHONE

(555) 555-5555

FROM*


Certificate Hero

EMAIL TOS

FOOTER

CANCEL UPDATE

Example of Email Received with Template Details



**CERTIFICATE
HERO**

Good Evening,

Please see the attached requested certificate of insurance.

If you have any questions, please contact
Certificate Hero Customer Success at customersuccess@certificatehero.com
or +15555555555.

Thank you,
Certificate Hero

Example of Completed Assign Email Template

Edit Assign Certificate Email Template ✕

HEADER IMAGE

EMAIL TOS

FOOTER

Example of Email Received with Template Details

