

## Email Templates in Salesforce

An **Email Template** in Salesforce is a pre-formatted email message that can be reused to send standardized emails to customers, leads, or other users. It helps in maintaining consistency, saving time, and ensuring accurate communication.

### Types of Email Templates in Salesforce

Salesforce provides different types of email templates based on use cases:

1. **Text Email Templates**
    - Simple plain text format with no formatting.
    - Can be used by all Salesforce users.
    - No merge fields support.
  2. **HTML with Letterhead Templates**
    - Uses a predefined letterhead for branding.
    - Supports merge fields.
    - Requires administrator access to create and modify letterheads.
  3. **Custom HTML Templates**
    - Allows users to create fully customized HTML emails.
    - Requires knowledge of HTML and CSS.
    - Supports merge fields.
  4. **Visualforce Email Templates**
    - Provides full customization using **Visualforce pages**.
    - Can be dynamically generated using Apex.
    - Supports complex logic and dynamic data retrieval.
  5. **Lightning Email Templates** (Newer Approach)
    - Created using **Lightning Email Builder** with drag-and-drop functionality.
    - Supports rich text, images, and merge fields.
    - Can be shared and used in Lightning Experience and Salesforce Classic.
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### How to Use Email Templates in Salesforce

Email Templates can be used in multiple ways in Salesforce:

1. **Sending Emails from the UI**
  - Go to a **Contact**, **Lead**, or **Opportunity** record.
  - Click **Email** and select a **Template**.
  - Personalize the email if needed and send it.
2. **Using in Workflows and Process Builder**
  - Automate emails based on record updates using **Workflow Rules** or **Process Builder**.
  - Select the **Email Alert** action and choose a **Template**.
3. **Using in Flow**
  - Send automated emails using **Send Email** action in **Flow Builder**.
  - Choose a **Lightning Email Template** for dynamic content.
4. **Using in Apex Code**
  - Send an email programmatically using **Apex** and merge fields.

```
public class EmailHelper {
    public static void sendEmail() {
        Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
        mail.setToAddresses(new String[]{'example@example.com'});
        mail.setSubject('Test Email');
        mail.setHtmlBody('Hello, this is a test email.');
```

```
        Messaging.sendEmail(new Messaging.SingleEmailMessage[]{mail});
    }
}
```

## 5. Using in Mass Emails

- Send bulk emails to a list of **Contacts** or **Leads** using **List Emails** in Salesforce.
- Use a predefined template to maintain consistency.

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## Best Practices for Email Templates in Salesforce

- ✓ Use **Merge Fields** ({{Recipient.FirstName}}) to personalize emails dynamically.
- ✓ Leverage **Dynamic Content** for different audiences using **Visualforce** or **Lightning Templates**.
- ✓ Test emails before sending them to a large audience.
- ✓ Use **Email Tracking** in **Salesforce Sales Engagement (High Velocity Sales)** to analyze email performance.
- ✓ Ensure compliance with **CAN-SPAM** and **GDPR** regulations.

## 1. What are Email Templates in Salesforce?

**Answer:** Email templates in Salesforce are pre-formatted messages used to send standardized emails to users, leads, and contacts. They help in automation, consistency, and personalization using merge fields.

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## 2. What are the different types of Email Templates in Salesforce?

**Answer:** Salesforce provides:

- **Text Email Template** (Basic, no formatting, no merge fields)
  - **HTML with Letterhead** (Uses predefined branding, supports merge fields)
  - **Custom HTML** (Fully customizable with HTML & CSS, supports merge fields)
  - **Visualforce** (Dynamically generated using Apex, supports complex logic)
  - **Lightning Email Templates** (Drag-and-drop UI, supports rich text & merge fields)
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### 3. What are Merge Fields in Email Templates?

**Answer:** Merge Fields dynamically insert Salesforce record values into an email template, such as:

```
Dear {!Contact.FirstName},  
Your account {!Account.Name} is now active.
```

This auto-populates based on the recipient's record.

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### 4. How do you use Email Templates in Workflow Rules?

**Answer:**

- Create an **Email Template**.
  - Set up a **Workflow Rule** with criteria.
  - Add an **Email Alert** action.
  - Select the Email Template to be used.
  - Activate the workflow to send emails automatically.
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### 5. What is the difference between Visualforce and Lightning Email Templates?

**Answer:**

Feature	Visualforce Email Template	Lightning Email Template
Customization	Fully dynamic using Apex	Drag-and-drop builder
Merge Fields	Supports complex logic	Standard fields only
Experience	Classic	Lightning
Styling	Requires CSS/HTML	Rich text editor

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### 6. Can we use Email Templates in Salesforce Flow?

**Answer:** Yes. You can use the "Send Email" action in Flow and select a **Lightning Email Template** or **Custom Email Body**.

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## 7. How do you send an Email Template using Apex?

Answer:

```
Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
mail.setToAddresses(new String[]{'user@example.com'});
mail.setTemplateId('00XXXXXXXXXXXX'); // Email Template ID
mail.setTargetObjectId('003XXXXXXXXXXXX'); // Contact or Lead ID
Messaging.sendEmail(new Messaging.SingleEmailMessage[]{ mail });
```

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## 8. What are Email Alerts in Salesforce?

**Answer:** Email Alerts are actions in Workflow, Process Builder, or Flow that send emails based on conditions. They use predefined Email Templates.

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## 9. How can we schedule automated emails in Salesforce?

Answer:

- **Workflow Rules** (Triggered on record updates)
- **Process Builder** (More advanced than Workflow)
- **Flow + Scheduled Path** (Best for time-based actions)
- **Apex Batch Job + Messaging.sendEmail()** (For custom scheduling)

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## 10. What are the limitations of Salesforce Mass Emails?

Answer:

- Limited to **5,000 emails per day** for Enterprise Edition.
- **No attachments** allowed in Mass Email.
- **No HTML customization** in mass email for some editions.

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## 11. How can we track Email Open Rates in Salesforce?

Answer:

- Use **Email Logs** (Setup → Email Log Files).
- Use **Enhanced Email Tracking** (Salesforce Sales Engagement).
- Use **Marketing Cloud** or **Pardot** for advanced tracking.

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## 12. What is the difference between List Emails and Mass Emails?

**Answer:**

Feature	List Emails	Mass Emails
Where Used?	Lightning	Classic
Customization	Supports templates	Plain text only
Limit	5,000 per day	5,000 per day

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## 13. Can we use Dynamic Content in Email Templates?

**Answer:** Yes, using **Visualforce Email Templates** or **Dynamic Content in Marketing Cloud/Pardot**.

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## 14. What are the Governor Limits for Sending Emails via Apex?

**Answer:**

- Maximum **5,000 emails/day per org**.
  - Up to **10 recipients per SingleEmailMessage** (For non-mass emails).
  - Mass emails can send to **up to 5,000 external email addresses** per day.
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## 15. How can we send an email to multiple recipients in Apex?

**Answer:**

```
Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
mail.setToAddresses(new String[]{'user1@example.com', 'user2@example.com'});
mail.setSubject('Important Update');
mail.setPlainTextBody('This is a test email.');
```

```
Messaging.sendEmail(new Messaging.SingleEmailMessage[]{ mail });
```

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## 16. How can we send an email with attachments in Apex?

**Answer:**

```
Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
Messaging.EmailFileAttachment attachment = new Messaging.EmailFileAttachment();
attachment.setFilename('Sample.pdf');
attachment.setBody(Blob.valueOf('Sample PDF Content'));
mail.setFileAttachments(new Messaging.EmailFileAttachment[]{ attachment });
Messaging.sendEmail(new Messaging.SingleEmailMessage[]{ mail });
```

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## 17. How do we add inline images in Lightning Email Templates?

**Answer:**

- Upload the image as a **File** in Salesforce.
  - Copy the **Public Link** and insert it into the template using <img> tag.
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## 18. What is the use of Email Opt-Out in Salesforce?

**Answer:**

- If checked on a **Contact/Lead**, that user will not receive marketing emails.
  - System emails (like password resets) are still sent.
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## 19. How can we send an email with a PDF attachment generated from Visualforce?

**Answer:**

- Use `PageReference.getContentAsPDF()` in Apex.
  - Attach it to an **Email Message**.
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## 20. What are Enhanced Emails in Salesforce?

**Answer:**

- Emails are stored as **Email Message Records** (not Activities).
  - Provides better tracking and reporting.
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## 21. How do we use Email Templates in Approval Processes?

**Answer:**

- Select an **Email Alert** as a notification step.
  - Use a predefined **Email Template**.
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## 22. How do we configure Organization-Wide Email Addresses?

**Answer:**

- Setup → Email → Organization-Wide Addresses.
  - Add an **email address** and verify it.
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## 23. What are Compliance BCC Emails?

**Answer:**

- Automatically BCCs emails to a compliance address.
  - Used for legal and auditing purposes.
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## 24. How can we debug Email Issues in Salesforce?

**Answer:**

- **Email Logs** (Monitor outgoing emails).
  - **Debug Logs** (Track Apex email issues).
  - **Email Relays** (If using external SMTP).
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## 25. What are the best practices for using Email Templates?

- ✓ Use **Merge Fields** for personalization.
- ✓ Test emails before sending bulk messages.
- ✓ Follow **CAN-SPAM & GDPR** compliance.
- ✓ Use **Marketing Cloud** for advanced tracking.