

SFDC Templates

A quick guide on how to create email templates

The process of writing email every time you wish to reply to a customer can be very hectic, especially if you keep writing the same thing over and over.

This quick guide will serve as a fast reliable way to create your first HTML email template via Salesforce lightning, take it as an initiative to automate your daily procedure in order to save time and your energy.

Step 1: Open your Salesforce lightning

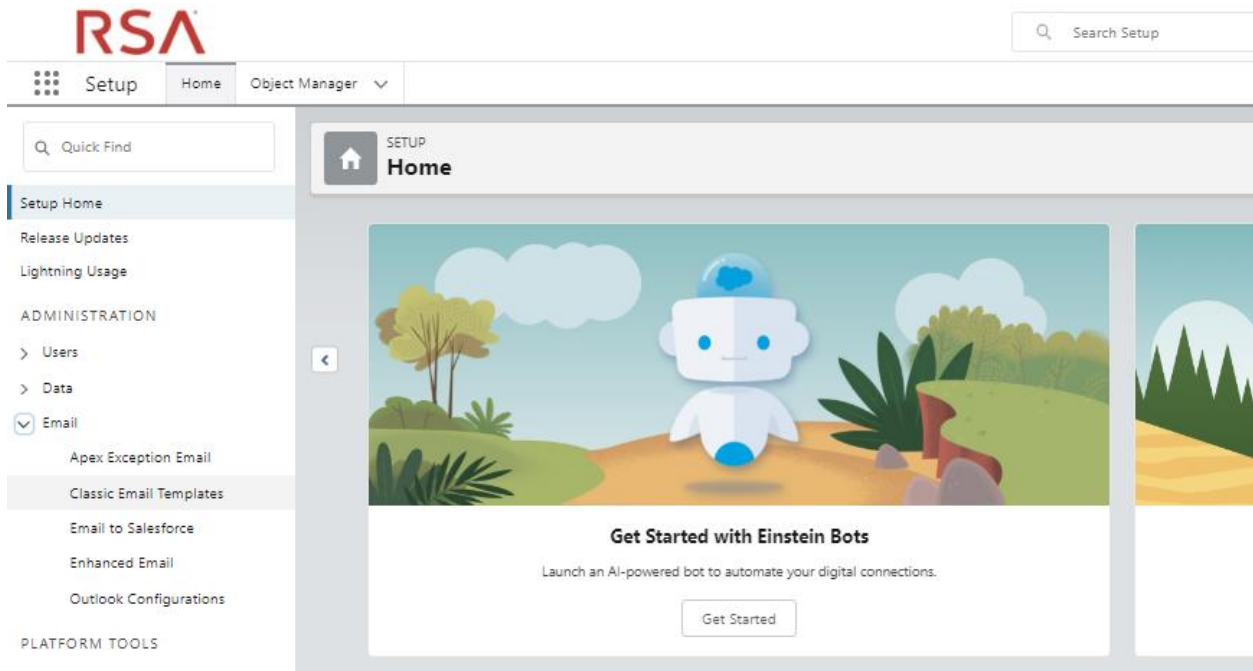
After opening your case view choose setup by clicking on the gear icon on the top right corner and then select **Setup** as shown in the screen shot below:

The screenshot displays the Salesforce Lightning interface for a user named 'Rishabh Verma'. The top navigation bar includes links to 'Portal', 'Downloads', 'SHA256 Checksum', 'EOPS', 'Ports', 'Access cloud', 'Contact CST', and 'Ideas'. The main header shows the 'RSA' logo and a search bar. Below the header, the 'Service Console' is visible, with a 'Cases' tab selected. The 'Cases' tab shows a list of cases under the 'Under Investigation' status. The list includes columns for 'Case ID', 'Contact Name', 'Current Status', 'Subject', 'Initials', 'Date/Time Opened', 'Case Age', 'CS GL', 'RSA Prod', 'Pref. Comm', 'Last Activity', and 'Milestone'. A 'Service Setup' menu is open in the top right corner, showing options for 'Setup for current app' and 'Setup'.

Case ID	Contact Name	Current Status	Subject	Initials	Date/Time Opened	Case Age	CS GL	RSA Prod	Pref. Comm	Last Activity	Milestone
02407985	Yousif Al Awachi	ATS Escalation Requested	RSA Log Injection to Sumologic	37.100	1/3/2023 8:31 PM	20 day(s) 22 hrs 3 min	Americas	RSA SecurID	Case Comments	1/24/2023 4:42 P...	Compliant
02410400	Mika Skovronski	Under Investigation with Vendor	New Epic Release (version Epic November 2022)	32.300	1/11/2023 5:58 PM	13 day(s) 0 hrs 37 min	Americas	RSA SecurID	Email	1/24/2023 2:09 P...	Compliant
02411959	Sourin Mondal	Web Conference Scheduled	Server Migration		1/17/2023 8:23 AM	7 day(s) 10 hrs 11 min	Asia Pacific	RSA SecurID	Email	1/24/2023 1:05 P...	Compliant
02413301	Rishabh Verma	Web Conference Scheduled	Batch of RSA servers is failing		1/19/2023 8:03 PM	4 day(s) 22 hrs 32 min	EMEA	RSA SecurID	Email	1/24/2023 1:36 P...	Compliant
02414851	Amalish Support	Under Investigation	Need to make sure pre-requisites for migratio...		1/24/2023 4:52 PM	0 day(s) 1 hrs 42 min	EMEA	RSA SecurID	Email	1/24/2023 9:22 P...	Compliant

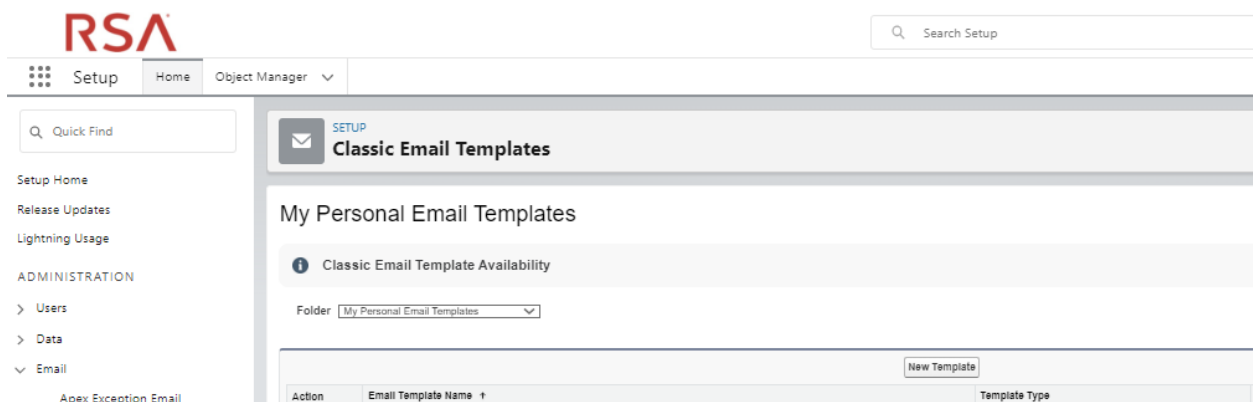
Step 2: Going to your custom templates

This will redirect you to the setup page, from there select **Email > Classic Email Templates** from the navigation menu on the right:

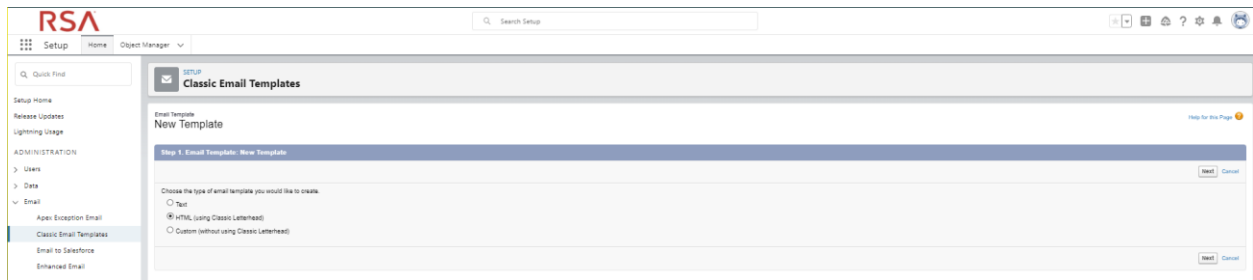


Step 3: Create your template

1- The previous step should redirect you to your own templates, from there click on the **New Template** button:

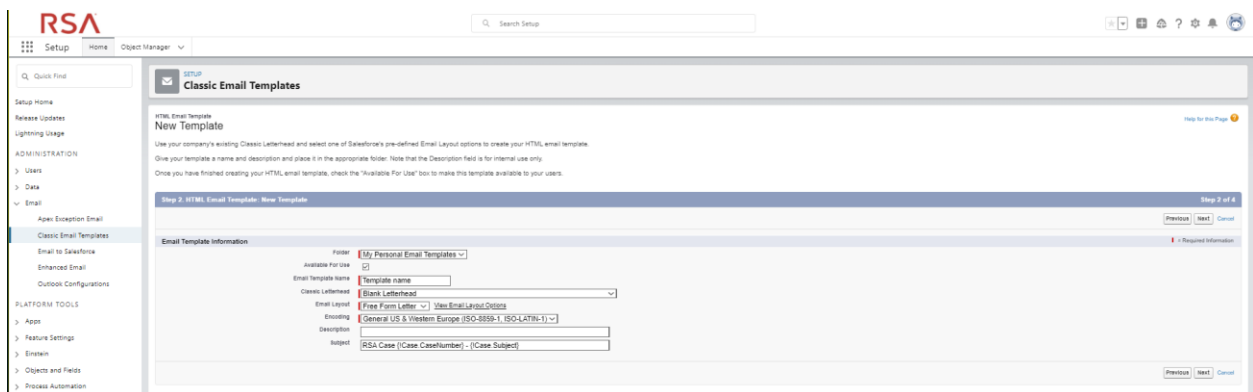


2- Select the **HTML** option then press **next**:



3- Enter the following info when creating the template:

Folder	<input type="text" value="My Personal Email Templates"/>
Available For Use	<input checked="" type="checkbox"/>
*Email Template Name	<input type="text" value="Template name"/>
*Classic Letterhead	<input type="text" value="Blank Letterhead"/>
Email Layout	<input type="text" value="Free Form Letter"/> View Email Layout Options
*Encoding	<input type="text" value="General US & Western Europe (ISO-8859-1, ISO-LATIN-1)"/>
Description	<input type="text"/>
Subject	<input type="text" value="RSA Case {!Case.CaseNumber} - {!Case.Subject}"/>



4- After entering the above, click on **Next**, this will take you to the page for creating the template, in this page enter the email the way you want it to be delivered for the customer. A good way to create a template for reference is to type it as follows:

Greetings {!Case.Contact},

Enter email content here

Best regards,

Alie El Deen Ibrahim

Technical Support Engineer I

www.rsa.com |

PLEASE NOTE that emails are only monitored during my shift hours .. If urgent assistance is needed at any time is needed Please call the numbers listed below:

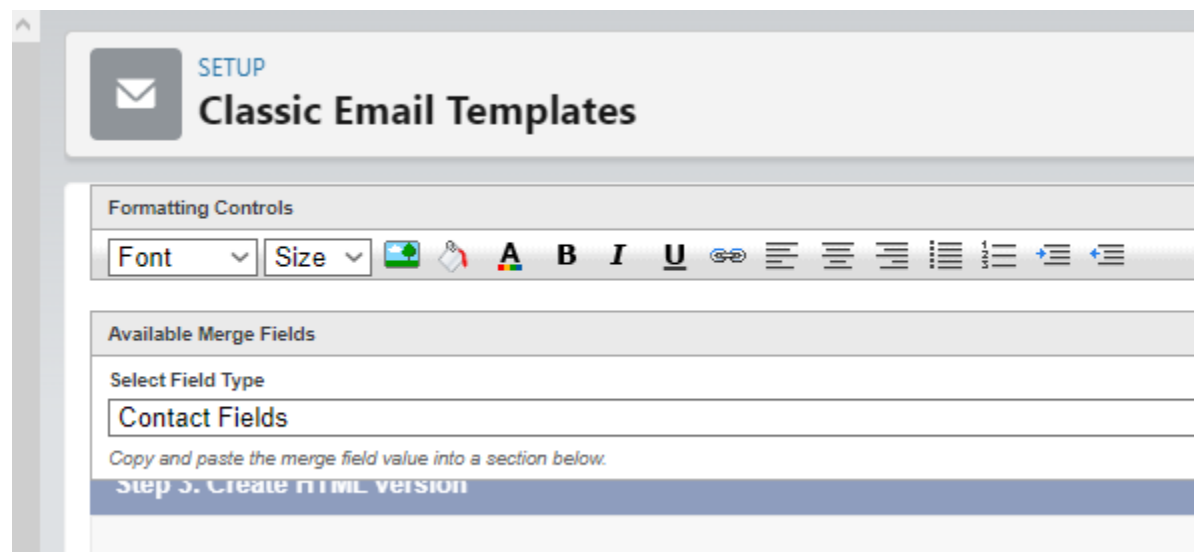
EMEA: Tel: +44 8000 668073 | US: 1-800-995-5095 | AP: +612 3813 8723



SecurID is now RSA.

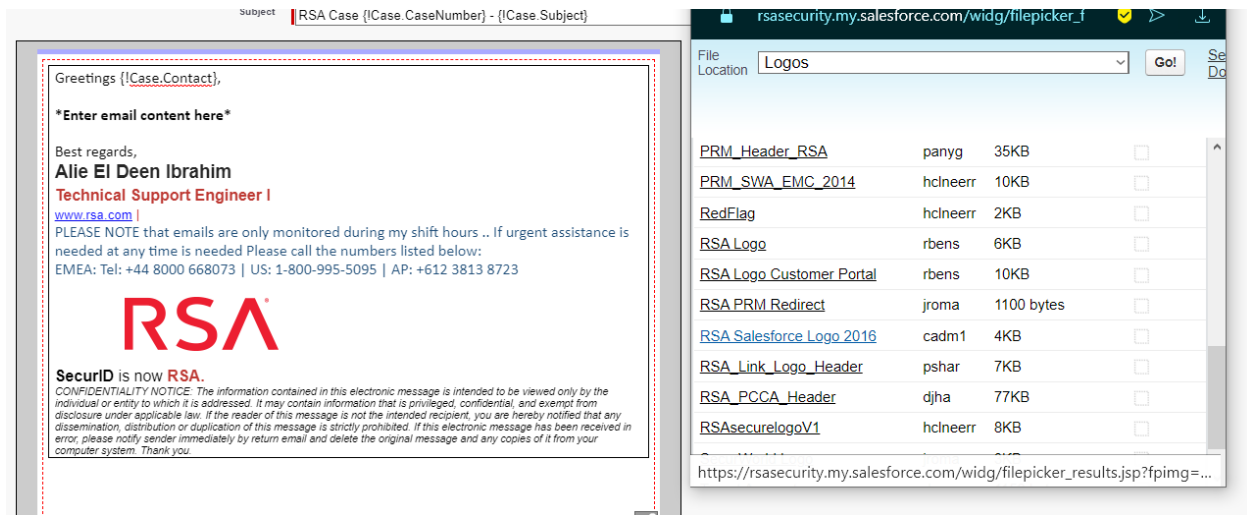
CONFIDENTIALITY NOTICE: The information contained in this electronic message is intended to be viewed only by the individual or entity to which it is addressed. It may contain information that is privileged, confidential, and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient, you are hereby notified that any dissemination, distribution or duplication of this message is strictly prohibited. If this electronic message has been received in error, please notify sender immediately by return email and delete the original message and any copies of it from your computer system. Thank you.

Note: The image that has the logo of the company needs to be imported separately, while on the page for creating the HTML email: click on the image attachment icon as shown below:



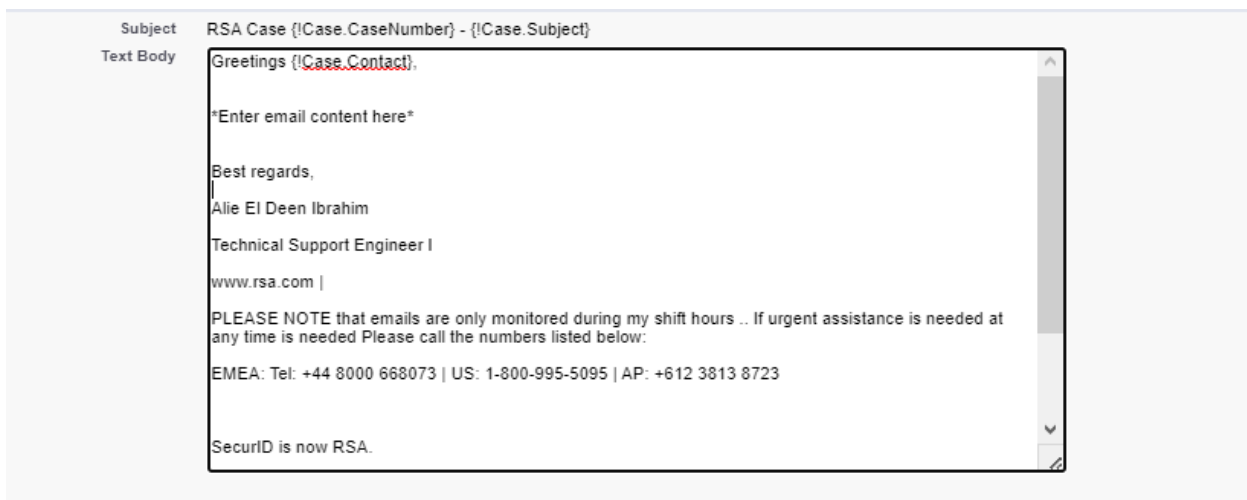
Once you click on it, a pop-up page will appear where you can choose multiple logos from. After searching around for the best possible logo, I found one named **RSA Salesforce Logo 2016**,

which can be found by searching under the **Logos** folder, however it should be noted that our resources should be updated in order to have more appealing email signatures:



5- Once you are done creating your HTML email, press next where you will be presented with the text only version of your email. Normally you can just copy it from the HTML version by clicking on the **Copy text from HTML version** button. The formatting here will lose some of its properties, so make sure you check the line spacing between paragraphs.

Before:



After:

Subject	RSA Case {!Case.CaseNumber} - {!Case.Subject}
Text Body	<p>Greetings {!Case.Contact},</p> <p>*Enter email content here*</p> <p>Best regards, Alie El Deen Ibrahim Technical Support Engineer I www.rsa.com PLEASE NOTE that emails are only monitored during my shift hours .. If urgent assistance is needed at any time is needed Please call the numbers listed below: EMEA: Tel: +44 8000 668073 US: 1-800-995-5095 AP: +612 3813 8723</p> <p> </p> <p>SecurID is now RSA. CONFIDENTIALITY NOTICE: The information contained in this electronic message is intended to be viewed only by the individual or entity to which it is addressed. It may contain information that is privileged, confidential, and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient, you are hereby notified that any dissemination, distribution or duplication of this message is strictly prohibited. If this electronic message has been received in error, please notify sender immediately by return email and delete the original message and any copies of it from your computer system. Thank you.</p>

6- Once you are done you will be shown the summary of the created template, you can view or edit the created template here, or **clone** it to create a new template.

HTML Email Template

Template name

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

My Personal Email Templates

Email Template Name

Template name

Classic Letterhead

Blank Letterhead

Email Layout

Free Form Letter

Encoding

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Author

Alie Ibrahim (Change)

Description

Created By

Alie Ibrahim, 1/24/2023 9:40 PM

Modified By

Alie Ibrahim, 1/24/2023 9:40 PM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Available For Use

☐

Last Used Date

Times Used

Email Template

Send Text and Verify Merge Fields

Subject

RSA Case {!Case.CaseNumber} - {!Case.Subject}

HTML Preview

Greetings {!Case.Contact},

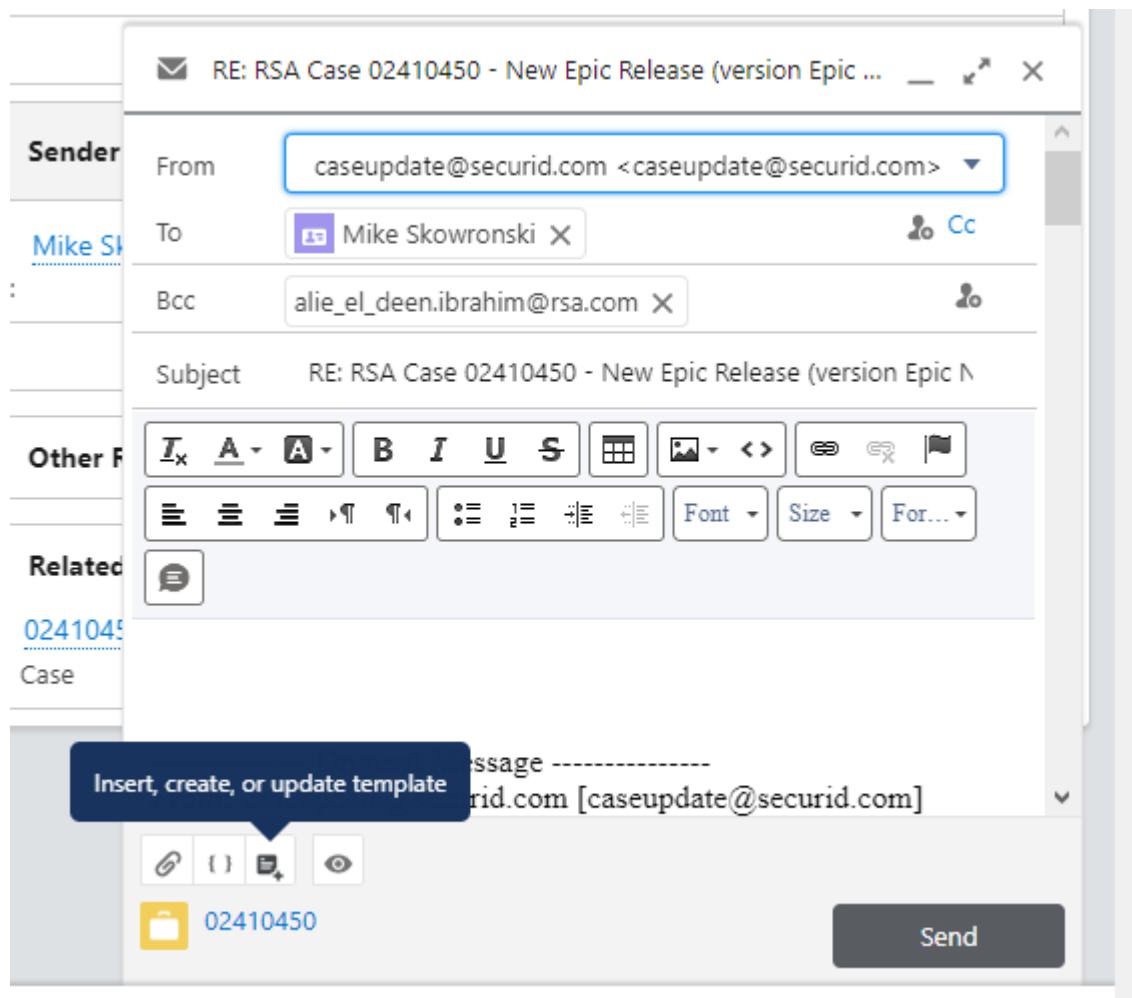
Enter email content here

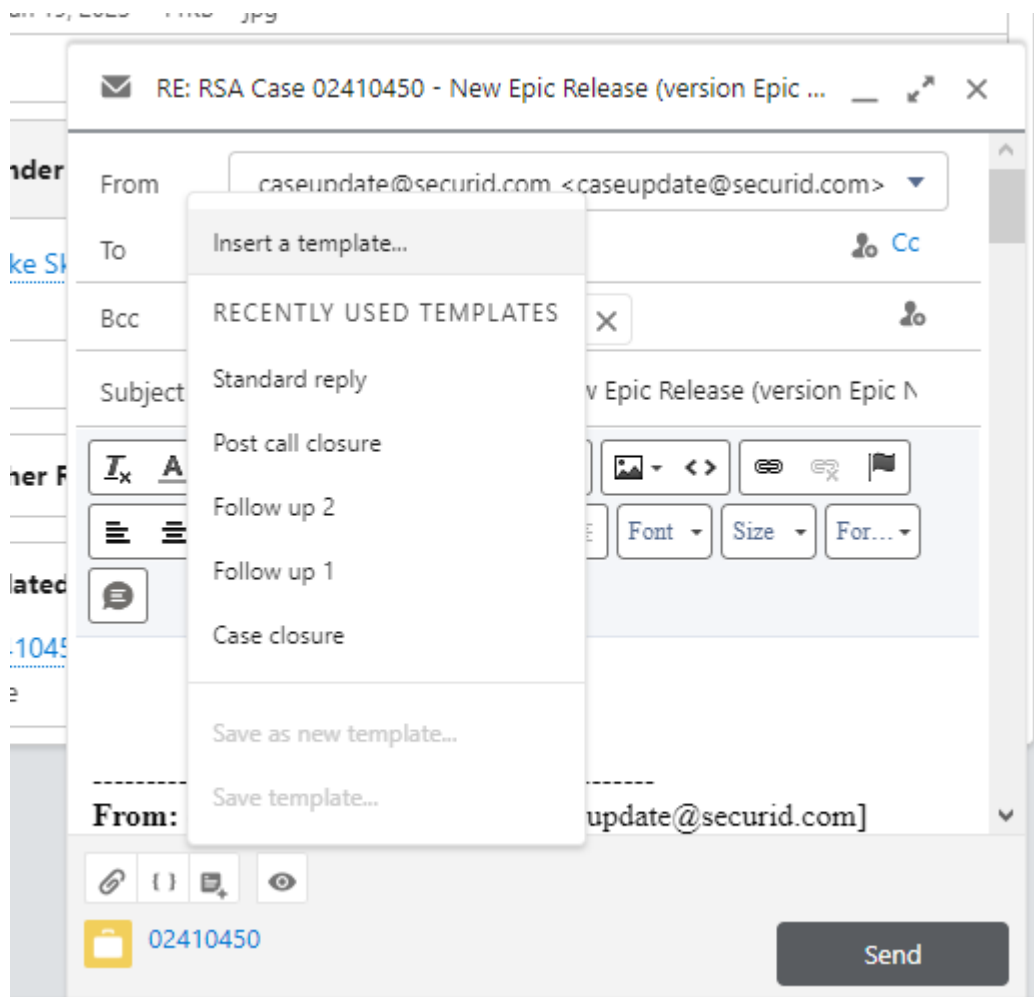
Best regards,
Alie El Deen Ibrahim
Technical Support Engineer I
www.rsa.com |
PLEASE NOTE that emails are only monitored during my shift hours .. If urgent assistance is needed at any time is needed Please call the numbers listed below:

Step 4: Using your templates

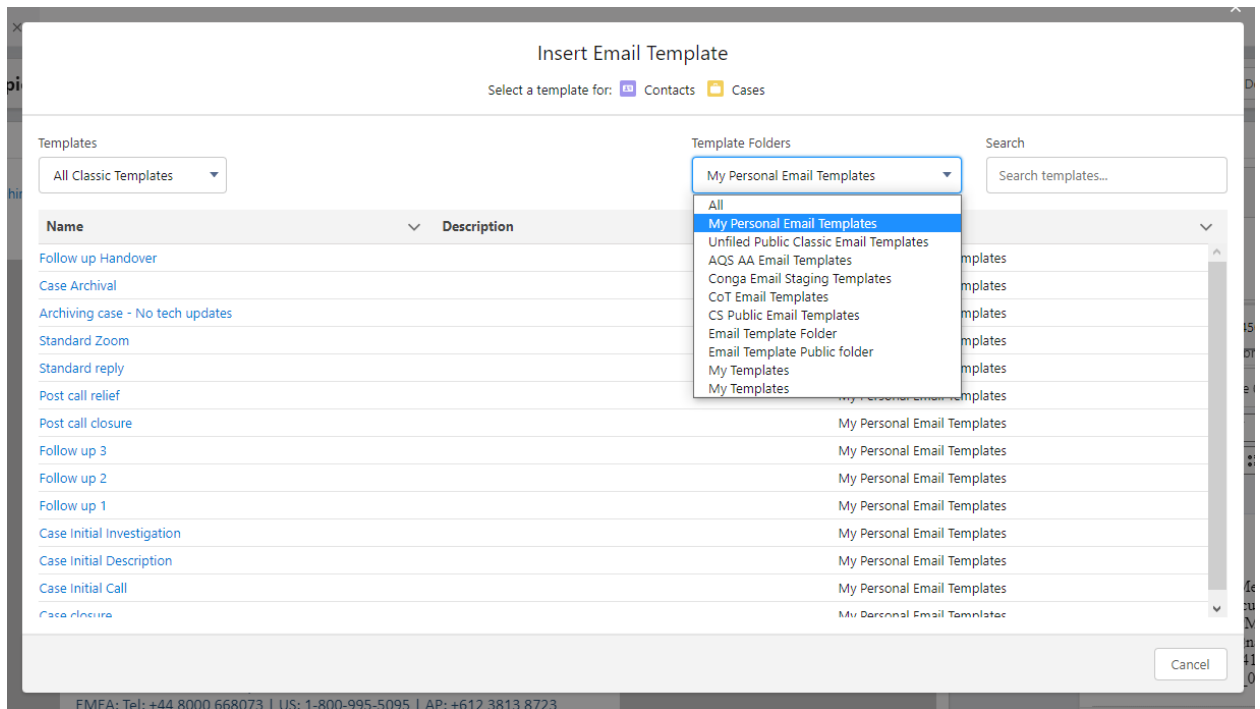
Once you are done with creating a few templates, all that remains is to use them. In order to do that, you will be selecting them for the available templates by doing the following:

- 1- Select the option type an email, and the field in which you type the email should include the option to select an available template.

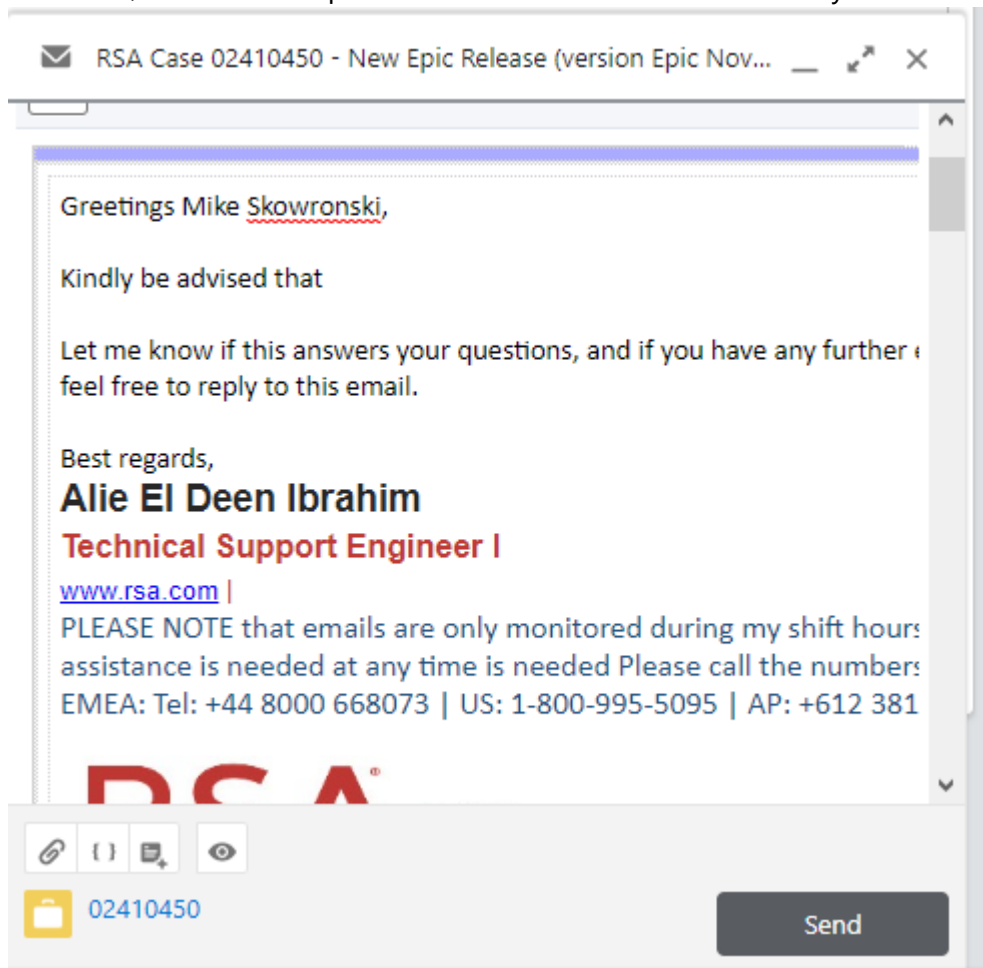




2- Make sure you select the folder in which your custom template was created.



- 3- After that, select the template itself and it should be inserted in your text field.



That's it!! Hope this PDF is helpful to you all 😊