EMAIL TEMPLATES

Email Templates is a draft/template which contains the email subject and content to be delivered to the required recipients.

We can send the Email Notifications from salesforce to the required external users based on the Email ID.

We can send the Email Notification on the various occasions

1. When a new case is raised by the Customer.

2. While performing the bank transactions.

3. On Occasion of the customer/employee's birthday or on festivals

Salesforce provides 2 Types of Email Templates.

1**. Standard Email Templates**: These are the readymade email templates provided by Salesforce by default as part of Salesforce CRM, which can be customizable and removable from the Organization.

2. **Custom Email Templates**: The Developer/Administrator can create one/more Email templates based on the business requirement.

All the Email Templates information will reside inside the "Email Template" object.

Each template should reside inside Email Template Folder i.e., we can segregate the Email Templates to the various folders based on the Application / Module / Department.

Salesforce provides 2 Types of Email Template Folders.

1. **Standard Folders**: These are the readymade Email Template folders provided by Salesforce by default.

We have 2 Standard Email Template Folders.

1. Unfiled Public Classic Email Templates Folder: It is a Public Folder, which can be accessible by all the users inside the organization.

2. My Personal Email Templates: It contains the Email Templates which can be accessible by the template owner.

2. **Custom Folders**: The Salesforce Developer/Administrator can create their own Email Template folder based on the business requirement.

Ex: Banking Templates Folder

    Finance Templates Folder

    Loans Templates Folder

All the Email Templates Folders information will reside inside the "Folder" object.

Click on "Setup" menu.

1. Search for the option "Classic Email Templates" in Quick Find box.

2. View the Email Templates.

3. Select the "Folder Name" from the Picklist.

4. View the Email Templates, available inside the folder.

5. Click on "New Folder", link to create a new Email Template folder.

We can create 4 types of Email Templates in Salesforce

1. Plain Text/Text

2. HTML (By using LetterHead)

3. Custom (Without using LetterHead)

4. Visualforce

Plain Text/Text: By using this template, we can send the email notifications to the required people in plain text format, which doesn't provide any attractive look and feel for the content.

Use Case: Configure an Email Template to notify the lead person upon creating a new lead record inside the Object.

Email Subject: Congratulations...!! Your Lead Record has been Created Successfully.

Email Content:

Dear Prospect,

Thanks for showing your interest in our Organization Products / Services.

We are pleased to inform that your Lead Record has been created in our database for the future reference.

One of our Sales Representative will contact you shortly.

Please Contact on the below address, if any queries.

***This is a System-Generated Email. Please Do Not Reply.

Thanks & Regards,

Sales Team,

DELL Inc.,

Contact us : +1 (800) 676-3344

Email us: sales@dell.com

Visit us: http://www.dell.com

Navigation: Click on "Setup" menu.

1. Search for the option "Classic Email Templates" in Quick Find box.

2. Click on "New Template" button.

3. Select the Email Template Type from the List.

4. Click on "Next" button.

5. Enter the Email Template Name, Unique Name and Description.

6. Select the Checkbox "Available for Use".

7. Select the "Email Template Folder" from the Picklist.

8. Specify the Email Subject and Content.

9. Click on "Save" button.

Testing Process: Open the Email Template, to be get Tested.

1. Go to the detailed Page of Email Template.

2. Click on "Send Test and Verify Merge Fields" button.

3. Select the Checkbox "Send Email Preview To".

4. Enter the "Recipient Email Id" inside the Textbox.

5. Click on "OK" button.

Observation: It will send the email notification to the specified Email Address.

MERGE FIELDS: Merge fields are used to embed the selected record content inside the Email Template, so that we can make the subject and content dynamic.

Merge Fields can be used in both "Email Subject" and "Email Content".

Syntax: {! <ObjectName>.<FieldName>}

Ex:

{! Account.Name}	{! Lead.FirstName}
{! Account.Rating}	{! Lead.LastName}
{! Position__C.Name}	{! User.FirstName}
{! Position__C.Location__C}	{! User.LastName}

Use Case: Configure an Email Template to notify the customer upon creating a new account record inside the Object. Embed the customer details inside the Template.

Email Subject:

Congratulations {! Account.Name}!! Your customer record has been created.

Email Content:

Dear {! Account.Name},

Thanks for purchasing the Products / Services from our Organization.

We are pleased to inform you, that Your Customer Record has been created successfully in our Database for the future reference.

Here are your Customer Details:

Customer Name : {! Account.Name}

Rating Value : {! Account.Rating}

Industry Name : {! Account.Industry}

Annual Revenue Value : {! Account.AnnualRevenue}

Contact Number : {! Account.Phone}

Fax Number : {!Account.Fax}

Customer Priority : {!Account.CustomerPirority__C}

Active Status : {! Account.Active__C}

Billing Address: {!Account.BillingStreet},

{!Account.BillingState},

{!Account.BillingCity},

{!Account.BillingCountry},

{!Account.BillingPostalCode}

Please Contact on the below Address, if any queries.

***This is an Auto-Generated Email. Please Do Not Reply.

Thanks & Regards,

{!User.FirstName} {!User.LastName},

Sales Team,

DELL Inc.,

Contact us: +1 (800) 565-3390

Email us: sales@dell.com

Testing Process: Open the Email Template, to be get Tested.

1. Go to the Detailed Page of Email Template.

2. Click on "Send Test and Verify Merge Fields" button.

3. Select the Checkbox "Send Email Preview To".

4. Enter the "Recipient Email Id" inside the Textbox.

5. Go to the "Recipient Record" Picklist, and Select the Object Name

      (Ex: Account)

6. Select an Account Record from the object, by using "Lookup Icon".

7. Click on "OK" button.

Observation: It will send the Email Notification to the specified Email Id, by embedding the selected record details inside the template.

HTML Type (By using LetterHead): HTML Type of Email Template allows us to send the email notifications to one or more users, by embedding the Email Content/Body inside the content part of the Letterhead.

Pre-Requisite: We should have a Letterhead to be used to make the Email Content look attractive.

Use Case: Configure a HTML Email Template to notify the Hiring Manager upon creating a new HR Record inside the Object.

Email Subject:

      Congratulations {!Hiring_Manager__c.Name} ..!! Welcome On-Board.

Email Content:

      Dear {!Hiring_Manager__c.Name},

          Welcome On-Board. Thanks for joining our organization.

          From Today onwards, you are also part of Recruitment Team.

          We are pleased to inform you that your HR Record has been created in our HR Portal Successfully.

Here are your Details...:

      Hiring Manager Name ....: {!Hiring_Manager__c.Name}

      Location Name : {!Hiring_Manager__c.Location__c}

      Contact Number : {!Hiring_Manager__c.Contact_Number__c}

      Email Address :{!Hiring_Manager__c.Email_Address__c}

      Designation : {!Hiring_Manager__c.Designation__c}

      Please contact on the below address for any queries.

      ***This is a System-Generated Email. Please Do Not Reply.

Thanks & Regards,

Talent Acquisition Team,

Kotak Mahindra Bank,

Contact us: +1 (800) 676-4488

Email us: hr@kotak.com

Visit us: http://careers.kotak.com

Custom Email Templates (Without Using LetterHead)

By using this template, we can send the email notifications to one or more users with the required Email Subject and Content, by making the Email Content look attractive with the help of "HTML Programming".

We have to use "HTML Tags" to make the content attractive.

Use Case: Configure a Custom Email Template, to be used to Notify the Hiring Manager, upon assigning a New Position Record.

Email Subject:

New Position Assignment Notification: {! Position__C.Name} ({! Position__C.Reference_Id__C})

Email Content:

Dear {!Position__c.Hiring_Manager__c},

We have the below New Open Positions available inside the Organization.

We are pleased to inform you, the below New Position has been assigned to you. Please start working on the Position.

Here are the Position Details...:

Position Name : {! Position__c.Name}

Position Reference ID : {! Position__C.Reference_Id__C}

Location Name : {! Position__C.Location__C}

Position Status : {! Position__C.Position_Status__C}

Number Of Vacancies : {! Position__C.Number_Of_Vacancies__C}

Maximum Budget : {! Position__C.Maximum_budget__C}

Milestone Date: {! Position__C.Milestone_Date__C}

HR Email Address: {! Position__C.HR_Email_Address__C}

Position Description : {! Position__C.Position_Description__C}

Please close the position on or before {! Position__C.Milestone_Date__C}.

Please contact on the below address for any queries.

***This is an Auto-Generated Email. Please Do Not Reply.

Thanks & Regards,

Talent Acquisition Team,

DELL Inc.

HTML Tags:

1. Break Tag (<br/>): This tag is used to break the line, which will move the cursor to the next line in the document.

2. Bold Tag (): This tag is used to represent the specified content in bold format.

Ex: Welcome to Email Templates

3. Italic Tag (<i>):   It will represent the content in Italic style.

Ex: <i> Welcome to Email Templates </i>

4. Underline Tag (<u>): This tag will represent the specified content along with Underline.

Ex: <u> This is Custom Email Template </u>

5. Font Tag: This Tag is used to represent the specified content with the specified font, size and color.

Properties:

      1. Face = "Font Name (Verdana / Times New Roman / Calibri...)"

      2. Size = "1 / 2 / 3 / 4 / ...."

      3. Color = "Color Name (Ex: Red, Blue)"

Ex:

      Welcome to HTML Tags.

6. Anchor Tag (<a>): This tag is used to represent a hyperlink inside the content, which re-directs the user to the specified website/url.

Properties: 1. href = "Website name / Path / URL"

      2. Target = "_blank / _New"

Ex: Click Here