**Editing and creating Email Templates:**

You can create four different types of email templates:

* **Text** - All users can create or change text email templates. See Creating Text Email Templates.
* **HTML with letterhead** - Administrators and users with the “Edit HTML Templates” permission can create HTML email templates based on a letterhead. See Creating HTML Email Templates.
* **Custom HTML** - Administrators and users with the “Edit HTML Templates” permission can create custom HTML email templates without using a letterhead. You must either know HTML or obtain the HTML code to insert in your email template. See Creating Custom HTML Email Templates.

**Creating Text Email Templates**

To create a text email template:

1. Click ***Your Name*** | **Setup** | **Email** | **My Templates**. If you have permission to edit public templates, click ***Your Name*** | **Setup** | **Communication Templates** | **Email Templates**.
2. Click **New Template**.
3. Choose the Text template type, and click **Next**.
4. Choose a folder in which to store the template.
5. Select the Available For Use checkbox if you would like this template offered to users when sending an email.
6. Enter an Email Template Name.
7. If necessary, change the Template Unique Name. This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. Select an Encoding setting to determine the character set for the template.
9. Enter a Description for the template. Both template name and description are for internal use only.
10. Enter the Subject for the message.
11. Enter the text to appear in the message.
12. Optionally, enter merge fields in the template subject and text body. These fields will be replaced with information from your records when you send an email. For details about using merge fields, see Merge Fields Overview.
13. Click **Save**.

**To add an attachment to a template**:

1. Click ***Your Name*** | **Setup** | **Email** | **My Templates**. If you have permission to edit public templates, click ***Your Name*** | **Setup** | **Communication Templates** | **Email Templates**.
2. Select a template.
3. Click **Attach File** from the email template detail page.
4. Choose a folder and click the document name to attach the document, or click **Search in Documents** and enter the file name to search for a document by name.

Alternatively, click **My Computer** to attach a file from your computer.

The attached file is included in every email that uses the template. Note that attachments in mass emails are sent as links rather than as physical files

**To create an HTML email template:**

1. Click ***Your Name*** | **Setup** | **Email** | **My Templates**. If you have permission to edit public templates, click ***Your Name*** | **Setup** | **Communication Templates** | **Email Templates**.
2. Click **New Template**.
3. Choose HTML (using Letterhead) and click **Next**.
4. Choose a folder in which to store the template.
5. Select the Available For Use checkbox if you would like this template offered to users when sending an email.
6. Enter an Email Template Name.
7. If necessary, change the Template Unique Name. This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. Select a Letterhead. The letterhead decides the logo, page color, and text settings of your email.
9. Select the Email Layout. The email layout determines the columns and page layout of the message text. Click **View Email Layout Options** to see samples.
10. Select an Encoding setting to determine the character set for the template.
11. Enter a Description of the template. Both template name and description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
12. Click **Next**.
13. Enter the Subject to appear in the email you send.
14. Enter the text to appear in the message you send. Click any section and begin entering text for your message. To prevent users from editing a section when using this template, click the padlock icon.
15. Change the style of your text by selecting the text and using the format toolbar. See Using the Format Toolbar for instructions on the format toolbar.
16. Optionally, enter merge fields in the template subject and body. These fields will be replaced with information from your lead, contact, account, opportunity, case, or solution when you send an email. For details about using merge fields, see Merge Fields Overview.
17. Click **Next**.
18. Optionally, enter the text-only version of your email or click **Copy text from HTML version** to automatically paste the text from your HTML version without the HTML tags. The text-only version is available to recipients who are unable to view HTML emails. Warning

https://help.salesforce.com/img/help/helpWarning_icon.gifSalesforce.com recommends that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you don't leave the text-only version blank and instead manually enter content, subsequent edits to the HTML version aren't reflected in the text-only version.

1. Click **Save**.

**To create a custom HTML email template**:

1. Click ***Your Name*** | **Setup** | **Email** | **My Templates**. If you have permission to edit public templates, click ***Your Name*** | **Setup** | **Communication Templates** | **Email Templates**.
2. Click **New Template**.
3. Choose Custom (without using Letterhead) and click **Next**.
4. Choose a folder in which to store the template.
5. Select the Available For Use checkbox if you would like this template offered to users when sending an email.
6. Enter an Email Template Name.
7. If necessary, change the Template Unique Name. This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. Select an Encoding setting to determine the character set for the template.
9. Enter a Description of the template. Both template name and description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
10. Click **Next**.
11. Enter the Subject to appear in the email you send.
12. Enter the HTML source text to appear in the message you send. This should include all the HTML tags.Note

https://help.salesforce.com/img/help/helpNote_icon.gifIf you are including an image, we recommend uploading it to the Documents tab so that you can reference the copy of the image that is on our server. For example:

<img src="https://na2.salesforce.com/servlet/servlet.ImageServer?

id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000" alt="Company Logo"

height="64" width="64"/>

1. Optionally, enter merge fields in the template subject and body. These fields will be replaced with information from your lead, contact, account, opportunity, case, or solution when you send an email. For details about using merge fields, see Merge Fields Overview.
2. Click **Next**.
3. Optionally, enter the text-only version of your email or click **Copy text from HTML version** to automatically paste the text from your HTML version without the HTML tags. The text-only version is available to recipients who are unable to view HTML emails. Warning

https://help.salesforce.com/img/help/helpWarning_icon.gifSalesforce.com recommends that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you don't leave the text-only version blank and instead manually enter content, subsequent edits to the HTML version aren't reflected in the text-only version.

1. Click **Save**.

**To Edit existing Email Templates**:

**Go to Your Name I Set Up I Administrator Set Up I Communication Set Up I Email Templates**

Step 1. Choose the existing Email Template to edit

Step 2. Click on the “Edit Properties” button and fill in all the required information (Changing the letterhead will change the header and footer log’s of the Email.)

Step 3. Click on the “Edit HTML Version” button to edit the body of the Email.

