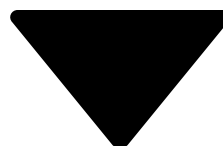


## 1. [Customize an Org to Support a New Business Unit](#)



## 2. [Configure an Email Letterhead and Template](#)

# Configure an Email Letterhead and Template


## Introduction

Having a consistent look makes correspondence from your teams instantly recognizable and professional. Here, we'll configure a template and letterhead that can be used by all team members for their day-to-day email needs.

## Create a Letterhead

Your Customer Support team isn't generic, and their correspondence shouldn't be either. Manager Kenya Collins has requested you create custom letterhead for her team's HTML email templates.

Before creating and customizing letterhead for the Customer Support team, you'll need to save the Support Team logo to your org.

1. Open this [image](#) and save to your desktop.
2. Click the **App Launcher**  then select **Files**.
3. Click **Upload Files**.
4. Choose the image you just saved to your desktop.
5. Ensure the title is **GetCloudyConsultingLogo**.

Note: To edit the title name, click the **down arrow** to the right of the file. Click **Edit File Details** and rename to **GetCloudyConsultingLogo**.

Now create a letterhead:

1. Click the **App Launcher** and select **Enhanced Letterheads**.
2. Click **New**.
3. Complete the details about the new letterhead:

Field	Value
Name	General Customer Support

Description	Use this letterhead for all public facing communications if no specific Customer Support letterhead exists
-------------	--

- Click in the header section and click the **insert image icon**.
- Select **Browse or Upload**.
- Select the **GetCloudyConsultingLogo** from the Owned by Me menu and click **Insert**.
- Click in the Header section and move the cursor to the next line by pressing ENTER.

Add merge fields:

- Enter the word **Dear**.
- Press the SPACEBAR.
- Click the **Insert merge field icon**.

Header

- In the Select Merge Field, enter **First Name** and select **First Name**.
- Click **Insert**.
- Add a **comma** after the last curly bracket and then press ENTER.

Header

- Click **Save**.

## Letterhead + Email Template

Now create an email template with the General Customer Support letterhead:


1. Click the **App Launcher** and select **Email Templates**.
2. Click **New Email Template**.
3. Fill in these details:

Field	Value
Email Template Name	Public Facing General
Description	To be used for all public facing emails if there is no more specific template available
Folder	Public Email Templates
Subject	<<REPLACE WITH SUBJECT>>
Enhanced Letterhead	General Customer Support

4. Press **Save**.

## Send an Email Test

Finally, test your email template.

1. Click the **Contacts** tab.
2. Select **All Contacts** from the menu, then select **Sean Forbes**.
3. Click **Email** in the Activity tab. (You may have to click **More** to find it.)
4. Click the **Insert, create, or update template icon** .
5. Select the **Public Facing General** template from list that appears.
6. Click **Insert** on the pop-up.
7. Review the template for accuracy.
8. In the Subject field, delete <<REPLACE WITH SUBJECT>> and fill in a subject line of your choice.
9. Click in the dashed line box and enter text of your choice, this will be displayed in the body of the email.

Subject

This is the subject

**i** You can only modify unlocked sections. For help, contact your Salesforce admin. [Clear Template](#)

Font  Size  **B** *I* U A 



Dear {{{Recipient.FirstName}}},

This is where you enter the text that will be displayed in the body of the email.

10. Click **Send**.

11. Check your inbox for the email.

Now that you've improved the look of communications for Customer Support, move on to the last step in this project, where you'll help the team work more efficiently by automating a few processes.

## Assessment Complete!

+100 points



Customize an Org to Support a New Business Unit

100%

Progress: 100%

Retake this Step

[View more projects](#)