salesforce

TIPS FOR USING HTML EMAIL TEMPLATES

Summary

Use HTML email templates to create professional high-impact emails. Create a single letterhead with your company's logo and branding, and use it across all your HTML email templates. Use the dynamic HTML email tracking feature to track when recipients open emails.

Email templates help you save time, standardize your emails, and communicate professionally with your customers.

Basic Concepts

- Create HTML email templates in two ways.
  - Use the Salesforce wizard and easy-to-use formatting controls to create professional HTML email templates—*without knowing HTML*.
  - Create a "custom" HTML template by cutting and pasting your own HTML—*for advanced HTML users*.
- To make sure your message is always communicated, Salesforce sends a "multi-part MIME" email, including both an HTML and text-only version of your email for email clients that cannot read HTML emails.

Create a Letterhead to Showcase Your Company's Brand

Using a Letterhead

Your letterhead includes your corporate color, logo, and graphics. The content comes from the HTML email template.
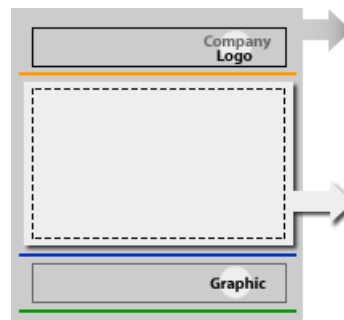
- Enforce your company's brand across all outbound communications by separating the letterhead from the templates that use it.
- Use a letterhead to make it easier to maintain your library of HTML email templates. If your company's logo changes, just change the logo in one place and HTML email templates using the letterhead will be updated automatically.

Track How Often People View Your HTML Emails

- Begin tracking HTML emails by adding the HTML Email Status related list to your lead and contact page layouts. This list includes the date the email was initially opened, most recently opened, and the total number of times it was opened.
- Use the HTML Email Status Report available to see a list of HTML email statistics.

Creating HTML Email Templates - *Without Knowing HTML*

This section provides all the information you need to create HTML email templates using Salesforce's wizards and formatting controls. If you have not already created a letterhead, do so now because it is required when creating an HTML email template.

To create an HTML email template:

1. From Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

2. Click **New Template**.

3. Choose `HTML (using Letterhead),` and click **Next**.

4. Complete the email template fields, and then click **Next**:

   - `Folder`—Choose a folder in which to store the template.
   - `Active`—Select this option only when the template is ready for use.
   - `Email Template Name`—The name is for internal use only.
   - `Related to Object`—Optionally, select the Salesforce object to which this template relates.
   - `Letterhead`—This determines the email's logo, colors, and text settings.
   - `Email Layout`—This determine the columns and page layout of the message. Click **View Email Layout Options** to see samples.
   - `Encoding`—This determines the character set for the template. Change this only when creating a template for use with different languages.
   - `Description`—The description is used as the title of any email activities you log when sending mass email.

5. Enter the content for the HTML email, and then click **Next**:

   - Click any section and begin entering text for your message.
   - Use the formatting toolbar to insert graphics and format the content.
   - Optionally, enter merge fields in the template subject and body.

6. Optionally, enter the text-only version of your email for recipients who cannot read HTML, and then click **Save**.

Creating Custom HTML Templates - for Advanced HTML Users

Custom HTML email templates are intended for advanced users that know HTML or companies that want to cut and paste existing HTML templates into Salesforce to get started right away.

To create a custom HTML email template:

1. From Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

2. Click **New Template**.

3. Choose `Custom (without using Letterhead)` and click **Next**.

4. Complete the email template fields, and then click **Next**. The fields are the same as for an HTML email template with a letterhead (see above), but custom HTML email templates do not have a `Letterhead` or `Email Layout`.

5. Enter the HTML source text (with HTML tags), and click **Next**.

   - Enter the `Subject` to appear in the email you send.

   - Enter the HTML source text to appear in the message you send. This should include all the HTML tags.

   - 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 "About Merge Fields" in the Salesforce online help.

6. Optionally, enter the text-only version of your email for recipients who cannot read HTML, and then click **Save**.

Creating Your Letterhead

Create a letterhead to define your corporate logo, colors, and overall look and feel. Letterheads make maintaining your HTML email templates easier.
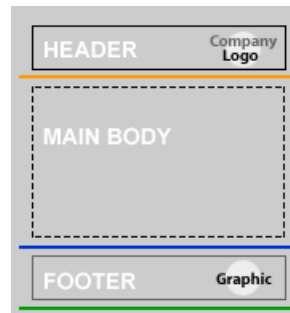
To create your letterhead:

1. From Setup, enter `Letterheads` in the `Quick Find` box, then select **Letterheads**.

2. Click **New Letterhead**.

3. Set the letterhead properties, and click **Save**.

4. Set the letterhead attributes to customize the letterhead to match your corporate look and feel.

5. Optionally, click **Preview** to display the letterhead in a separate window.

6. Click **Save** when you are done.

Best Practices for Using Letterheads

- Keep the number of letterheads to a minimum. Most companies only require a single letterhead. You only need to create a second or third letterhead if your company has multiple divisions with different corporate brands or if you have a company logo in different languages.
- Use a single letterhead as the foundation for all your HTML email templates.
- If your logo, company colors, or corporate identity change, make a change to your letterhead and that change will be applied to all HTML email templates using the letterhead.
- Your letterhead can define the header and footer of all HTML emails. The HTML email template determines the main body of your email.