

Email Template creation

Overview

In this section, you will find information about how to create or personalize your email templates for the submission of quotes.

Table of content

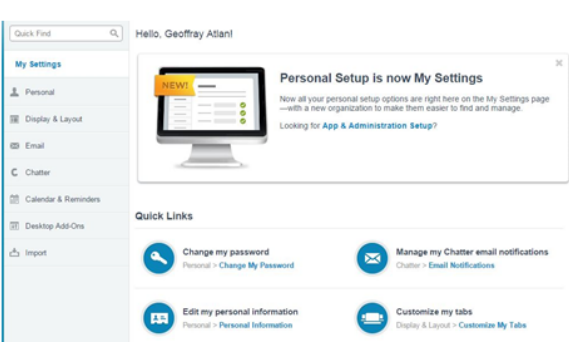
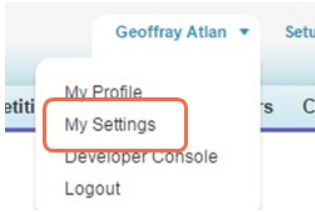
Concerned profiles:

ALL

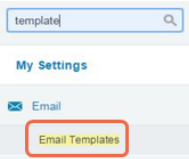
Step By Step

The body of the email sent with the PDF attachment can be chosen by the user in the personal email templates.

Personal email templates can be created by the user to fill in the content of the email.



On the top left, in the search bar, you can type « Template » and select Email Templates



The following screen will be displayed

Email Templates [Help for this Page](#)

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You can use these email templates when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.

Folder: Quotation [Edit](#) [Create New Folder](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

[New Template](#)

Action	Email Template Name ↑	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Approve Quotation	Text	✓		Saad	15/12/2015
Edit Del	Send Quotation	Text	✓		Saad	25/11/2015
Edit Del	Test quotation	Visualforce	✓		Saad	28/12/2015

Then click on the « New Template » button

On the following screen, you will select Text and click Next.





We recommend you to use Text Email Template. The HTML allow using Letterhead. But in that case, it will be better to contact you

Step 1. Email Template: New Template

Next

Cancel

Choose the type of email template you would like to create.

- ☒ Text
- ☐ HTML (using Letterhead)
- ☐ Custom (without using Letterhead)
- ☐ Visualforce

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Available Merge Fields
Select Field Type
Contact Fields
Select Field
Copy Merge Field Value
Copy and paste the merge field value into your template below.

Step 4: text email template: new template

Previous Save Cancel

Email Template Information

Folder: My Personal Email Templates

Available For Use: ☒

Email Template Name:

Template Unique Name: (i)

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

Description:

Subject:

Email Body:

The upper part of the page is for the insertion of merge fields. This is where you can customize the templates by grabbing different pieces of information. For example, the Account Name, the Contacts first name who you are sending the template to, etc.

The bottom part of the page is where you can create the email template and actually copy and paste the values in.

The merge fields allows you to enter information contained in Quotes, Contacts, Accounts, etc. directly in the email. For example, if you want to enter :« Hi (title) (name) »

On the first picklist, you select « Contact Fields ». In the second, you select « Title ». The result appears on the third row. You copy this value and paste it in the email body.

The result is as follows

Available Merge Fields
Select Field Type
Contact Fields
Select Field
Copy Merge Field Value
Copy and paste the merge field value into your template below.

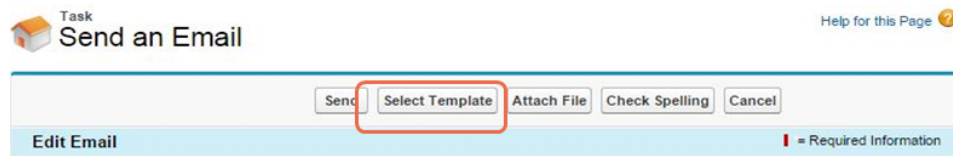
Available Merge Fields
Select Field Type
Contact Fields
Select Field
Copy Merge Field Value
Copy and paste the merge field value into your template below.

Email Body

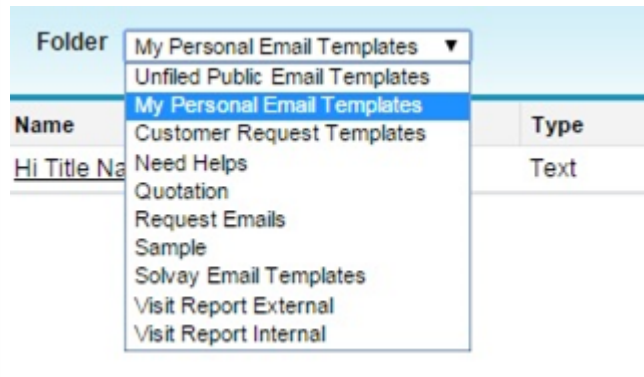
Hi {!Contact.Title} {!Contact.Name},

After having created the Email body, click on the « Save » button. The email template is now created.

The next time you will send an email, you will be able to select the Email template you created.



The following screen will be displayed. You can select the right template by clicking on it.



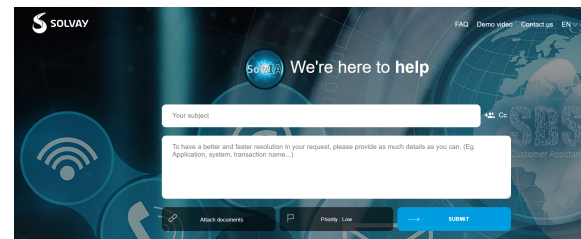
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Related articles

- [Quote creation from a Recurrent Business Opportunity.](#)
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- [Quote Mass Update](#)
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- [Quote Approval Process](#)
- [Quote communication](#)
- [Customer validation and Follow up](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Definitions, Types of Opportunities & Process](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example