

Email Mapping Rules - Update

Overview

Who: GBU Data Stewards

What: Fill an Excel template to update existing *Email Mapping Rules*, and send it via a freshdesk ticket.

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Step-by-step

I. Identify accounts and users	
Download the Excel template : https://solvay-crm.my.salesforce.com/01524000003G0He	
Open the excel template, and select "EMR Update" sheet.	
II. Fill the Excel template	
To update Email Mapping Rules, we need its ID.	
To find them, run the report " <i>Email Mapping Rules - Complaint</i> ", " <i>Email Mapping Rules - Contract</i> " or " <i>Email Mapping Rules - Visit Report</i> ".	
These reports are in the GBU Data Stewards Reports folder	
You should fill all the fields that are useful to define the rule (even if the values do not change).	
=> You should copy the criteria from the report.	
When the file will be uploaded, if a cell is blanked it will be erased the actual value.	
III. Send the template to CRM support via Freshdesk.	
Once filled, send the Excel file to CRM support via Freshdesk.	

Related articles

[Email Mapping Rules - Creation](#)

Can't find information?

- [Web support contact](#)

Email Mapping Rules - Deletion