

Email Mapping Rules - Creation

Overview

Who: GBU Data Stewards

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

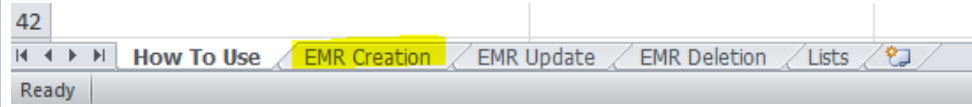
Note: For Complaint and Visit Report, it is possible to add Email Mapping Rules to persons who are not in Salesforce

For Contract, only Salesforce users are available

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Step-by-step

I. Get the file	
Download the Excel template : https://solvay-crm.my.salesforce.com/01524000003G0He	
Open the excel template, and select "EMR Creation" sheet.	
II. Fill the Excel template	
You can refer to this page to have the global description of all the template columns	

First of all, fill only the fields you need on your rule.

- i.e. if the *BU* field is empty it means that the person will receive an email whatever the *BU* chosen on the record

- if the *BU* field is filled with a value it means that the person will receive an email only if this *BU* has been selected on the record

The first column "Process Name" is mandatory.

With this field, you select if the new rule is about *Complaint, Visit Report or Contract*

=> Columns B, C and D are autopopulated

	A	
2	Process Name	SLV4_PR
3	Complaint	Complain
4		

All the yellow fields are formula fields => autopopulated

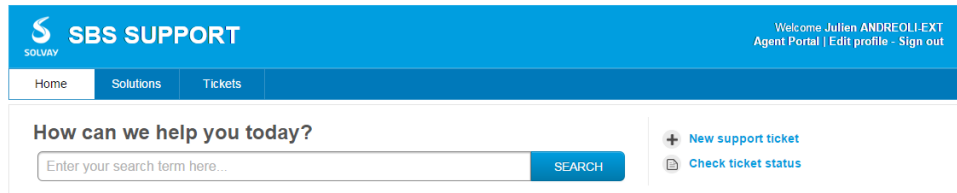
All the green fields need to be filled using Salesforce ID => use reports to find the correct IDs (go to [this page](#) to have explanations on how to find them)

If record type = Complaint or Visit report, be careful with the field Email

=> if it is a wrong email address, the person will never receive any email !

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 - Update](#)

[Email Mapping Rules - Deletion](#)

Can't find information?

- [Web support contact](#)