

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.

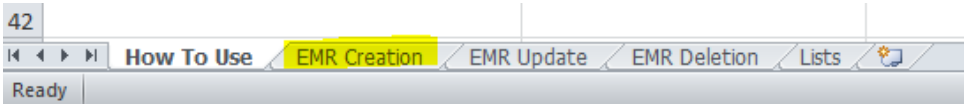
Note: For Complaint and Visit Report, it is possible to add Email Mapping Rules to persons who are not in Salesforce

For Contract, only Salesforce users are available

Table of contents

- [Overview](#)
- [Table of contents](#)
- [Step-by-step](#)
 - [I. Get the file](#)
 - [II. Fill the Excel template](#)
 - [III. Send the template to CRM support via Freshdesk.](#)
- [Related articles](#)
- [Can't find information?](#)

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

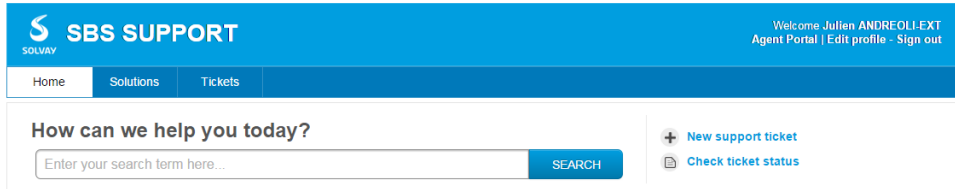
All the green fields need to be filled using Salesforce ID => use reports to find the correct IDs (go to [this page](#) to have explanations on how to find them)

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.



The screenshot shows the SBS SUPPORT Freshdesk portal. At the top, there's a blue header with the 'SBS SUPPORT' logo on the left and a welcome message 'Welcome Julien ANDREOLI-EXT' with links for 'Agent Portal', 'Edit profile', and 'Sign out' on the right. Below the header is a navigation bar with 'Home', 'Solutions', and 'Tickets' tabs. The main content area has the heading 'How can we help you today?' followed by a search bar with the placeholder text 'Enter your search term here...' and a 'SEARCH' button. To the right of the search bar are two links: '+ New support ticket' and 'Check ticket status'.

Related articles

[Email Mapping Rules - Update](#)

[Email Mapping Rules - Deletion](#)

Can't find information?

- [Web support contact](#)