

Email Mapping Rules maintenance - GBU Data Stewards

You will find in this section guidelines to maintain email Mapping Rules for your GBU.

Objective : Email mapping rules allow to send email notifications to any "recurrent" **Solvay employees** even if **not in Salesforce** (or generic mailbox) , according to criteria your GBU define , avoiding users to add them each time in Visit report team , Complaint team.

1- since Winter19 release GBU data steward can easily **Create / Update / Delete** email Mapping rules directly from "**email mapping rules list views**" you must adapt to your need (options **Edit / Clone / Delete**) .

2- to manage mass updates you can extract records into Excel file using reports "Email mapping rules" from " GBU Data steward" CRM Report folder and create a Service one ticket catalog item **Account & Contact Management** (must contain email mapping rule code 'ex: **EMR-7540**

If you want to display all existing email Mapping Rules for your GBU, you can adapt existing report from folder GBU Data steward *Email Mapping Rules* . For request of for mass upload, email *Mapping Rule: ID* will be required in the report ! **This ID is the unique key to Update or Delete Email Mapping Rules**, in report or list view **the email mapping rule name** is used to open the record.

For example:

Email Mapping Rule: Email Mapping Rule Name	Email Mapping Rule: ID	GBU	BU	Email	User First Name	User Name
EMR-1640	a1H240000036Ce1	Novecare	-	stefan.martens@solvay.com	Stefan	MARTENS
EMR-1641	a1H240000036Ce2	Novecare	-	stefan.martens@solvay.com	Stefan	MARTENS
EMR-1642	a1H240000036Ce3	Novecare	-	stefan.martens@solvay.com	Stefan	MARTENS
EMR-1701	a1H240000036Cf0	Novecare	-	samantha.fear@solvay.com	Samantha	FEAR

To complete the Email Mapping Rules template, you have to know where and when each field is used.

See below :

FIELD	VALUES	When this field should be used ?	Used for ?
ID	ID of the Email Mapping Rules	To Edit or Delete	All processes
GBU	Use the picklist	To Create or Edit	All processes
SLV4_GBU__C	Auto populated	To Create or Edit	All processes
SLV4_BU__C	Use the picklist	To Create or Edit	All processes
Process Name	Use the picklist	To Create	All processes
SLV4_PROCESS_NAME__C	Auto populated	To Create	All processes
RECORDTYPEID	Auto populated	To Create	All processes
SLV4_EMAIL_TEMPLATE_NAME_STAGE__C	Auto populated	To Create	Visit Report
SLV4_CORPORATE_GROUP__C	ID of the Corporate Group	To Create or Edit	Visit Report / Complaint / Customer Request
SLV4_REGION__C	Use the picklist	To Create or Edit	All processes
SLV4_COUNTRY__C	Use the picklist	To Create or Edit	All processes
SLV4_STEP__C	Use the picklist	To Create or Edit	Complaint / Customer Request
SLV4_MOTIVE__C	Use the picklist	To Create or Edit	Complaint
SLV4_SEVERITY__C	Use the picklist	To Create or Edit	Complaint
TYPE	Use the picklist	To Create or Edit	Complaint
SLV5_TYPE__C	Auto populated	To Create or Edit	Complaint
SLV5_SUB_TYPE__C	Use the picklist	To Create or Edit	Complaint
SLV4_RESOLUTION_SITE_CODE__C	ID of the plant	To Create or Edit	Complaint
SLV4_PRODUCT_FAMILY__C	ID of the Product Level 3	To Create or Edit	All processes
SLV4_EMAIL__C	Email adress	To Create or Edit	Visit Report / Complaint / Customer Request
SLV4_USER_FIRST_NAME__C	First Name	To Create or Edit	Visit Report / Complaint / Customer Request
SLV4_USER_NAME__C	Name	To Create or Edit	Visit Report / Complaint / Customer Request
SLV5_CONTRACT_APPROVER_ROLE__C	Use the picklist	To Create or Edit	Contract
SLV5_USER__C	ID of the User	To Create or Edit	Contract
USER	Name of the User	To Create or Edit	Contract

As you can see, you need to provide Salesforce Id in columns => need to create reports.

1. To find the Corporate Group ID:
 Create new report with "Accounts" report type
 Filter on **Account Record Type = Corporate Group**
 You can also add a filter on the Account Name if needed
 Add the **Account Name** and **Account ID** fields

Report Type: Accounts
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: id

Filters: Add
Show: All accounts
Date Field: Created Date Range: All Time From: []

Account Record Type equals Corporate Group

Preview Tabular Format Show Remove All Columns

Account ID	Account Name
0012400000f4gQ3	SYNTHOS
00124000015zgZ0	HIGHTECH HONGKONG GROUP LIMITED
0012400000Ta5jM	VEDANTA
0012400000XMZcO	SPECTRUM BRANDS
0012400000cPb4t	BANDHUIT

=> Fill the template with the Account ID

2. To find the Resolution Site Code ID:
 Create new report with "Utilities" report type
 Filter on **Type = Plant**
 You can also add a filter on Utility : Name if needed
 Add the **Utility : Name** and **Utility : ID** fields

Report Type: Utilities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: id

Filters: Add
Show: All utilities
Date Field: Utility: Created Date Range: All Time From: []

Type equals Plant

Preview Tabular Format Show Remove All Columns

Utility: Name	Utility: ID
MSCB	a1624000001gKsY
9037	a16240000022ejs
5016	a1624000001yeg8
54UD	a1624000000i4cO
54VD	a1624000000i4cP

=> Fill the template with the Utility : ID

3. To find the Product Family ID:
 Create new report with "Products with product ID" report type
 Filter on **Level = Level 3**
 You can also filter on your GBU or on the product name if needed
 Add the **Product Name** and the **Product ID** fields

Report Type: Products with product ID
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All # []

Search: level

Drag and drop to add fields to the report.

- Products
 - Level
 - Level 1: Product Name
 - Level 2: Product Name
 - Level 3: Product Name
 - Level 4: Product Name
 - Level 5: Product Name

Filters Add

Show: All products

Date Field: Created Date Range: All Time

Level equals "Level 3"

Preview Tabular Format Show Remove All Columns

Product Name	Product ID
CF3	01t24000003EUda
SOLKANE PHARMA	01t24000003EUdb
Blends	01t24000003EUdc
IXOL	01t24000003EUdd

=> Fill the template with the Product ID

4. To find the User ID:

Create new report with "Users" report type
 You can filter on First Name, Last Name or Email if needed
 Add **First Name**, **Last Name**, **Email** and **User ID** fields

Report Type: Users
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All # []

Search: email

Drag and drop to add fields to the report.

- User Information
 - Email
- Salesforce.com Information
 - Admin Info Emails
- User Preferences
 - Email Encoding
 - Info Emails
- Contact: Ph/Fax/Email
 - Email
- Account: Custom Info
 - Contact Email
 - CSR Email

Filters Add

View: Active User

Date Field: Last Login Range: All Time From: To:

To add filters, click Add.

Preview Tabular Format Show Remove All Columns

First Name	Last Name	Email	User ID
Kedarnath	Tripathi	kedarnath.tripathi@solway.com	0052400000iYnE
Keiko	Homma	keiko.homma@solway.com	0052400000iYnF
Jong-bum	Ryu	jong-bum.ryu@solway.com	0052400000iYwK

=> Fill the template with the User ID

Related documents :

- [Email Mapping Rules - Creation](#)
- [Email Mapping Rules - Deletion](#)
- [Email Mapping Rules - Update](#)

Last modifications :

User	Last Update
GILLES, Anne	1496 days ago
GASQUETON, JULIEN	3310 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	