

9 Custom Salesforce Email Template Best Practices

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It's easy to set up a Salesforce email template in order to send mass emails to Leads and Contacts. However, since Salesforce has a limit of 1,000 emails per day, as well as a per send limit of 250 for Professional Edition and 500 for Enterprise Edition, this mass email capability is best suited to highly targeted communications with a select group of Leads or Contacts – usually a very warm audience. Below are nine best practices for ensuring that your mass email stands out from the crowd.

The Use of Custom Salesforce Email Templates

Setting up a Custom Salesforce email template takes a little more time than setting up a text or HTML letterhead template, but a Custom template provides much more flexibility than the other two options. In addition, the output of Custom templates is easier to read on mobile devices such as iPhone and Android-based phones than text or HTML letterhead based templates.

If you don't have any experience using HTML tags, it's worth spending the time to learn about some of the basic tags. [w3schools.com](#) is an excellent resource. The tag that you'll use the most is the <p> tag, which will separate your body text into paragraphs.

To create a Custom template, select the Custom (without using Letterhead) radio button in the following screen.

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

☐ Text

☐ HTML (using Letterhead)

☒ Custom (without using Letterhead)

☐ Visualforce

Salesforce Email Template Best Practices

The following best practices can improve the results of your targeted, mass email campaign — whether your goal is an email reply, an inbound phone call or enticing the recipient to click on a link to a specific blog post or landing page.

1. Create Template Folders

Use email folders to organize your templates rather than filing all templates under the default, Unfiled Public Email Templates. Then, set the appropriate access and permissions for each folder. This will make it easier for users to locate the right template.

2. Manage Images Within Your Group or Department

Any images that you want to display in a Custom Salesforce email template need to be publicly accessible. Rather than relying on your organization's Webmaster to upload images to your Web host, you can upload any needed images to a file hosting service such as [Amazon S3](#) (which is very reasonably priced). You simply need to create a bucket (similar to a folder), upload an image and then make the image public. The URL that you will use in your HTML will look something like this:

<https://s3.amazonaws.com/bucketname/yourbrand-email-banner.png>

You can also host images as Salesforce Document records. Upload an image as a new Document and check the **Externally Available Image** checkbox. After the image has been uploaded, right click on the image and select Open Image in New Tab. You can then select the following part of the URL and add it to the HTML in your template:

<https://c.na12.content.force.com/servlet/servlet.ImageServer?id=000A0000000000AB&oid=00AA00000000ABcD>

3. Create a Header Banner

Add a banner to the top of your email template that includes your logo on the left and some informational text or a value message on the right. Since email recipients are increasingly reading their emails on a mobile phone, it's important to keep your banner to less than 300 pixels in width — otherwise, the body text in your email will be shrunken down on mobile devices such as iPhone.

In the right hand image below, a 600 pixel wide banner results in the body text being scaled to half the size of the text below the 300 pixel wide banner shown in the left hand image.



4. Keep Your Subject to 50 Characters or Fewer

In the iPhone screen captures above, the subject contains exactly 50 characters. Any more than 50 characters forces a third subject line, which results in less visible body text “above the fold”. If you can capture the recipient's attention before they have to scroll, you'll increase the chances of the desired outcome (such as an immediate reply).

5. Use a Font That's Easy to Read on Mobile Devices

With a Custom HTML template, you can specify font type, size and color using HTML tags. To make your email stand out from all the plain text emails that people receive, you can use a font such as verdana and use a dark gray color rather than a standard black font. Simply include a font tag such as this in the HTML of your custom Salesforce email template.

6. Add Meaningful Alt Text to Your Header Banner

Some email clients, including GMail, will not automatically display linked images in HTML emails — a “display images” link must first be clicked. However, alt text will display by default in these email clients, so it's important that alt text is both included and is meaningful. For example, the alt text should not read “Logo Banner”.



In your Custom template, you can include this text by adding alt="text" to your banner image:

7. Include HTML Headings to Break Up Text

With a custom Salesforce email template, you can include HTML headings within the body text. If you use more than one heading in the email body, it's best to use H4 tags, as multiple H1, H2 or H3 tags seem to render inconsistently in size.

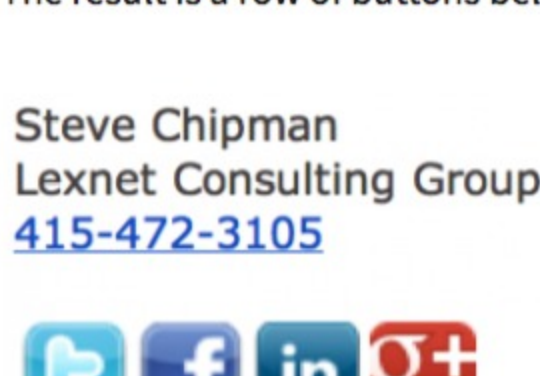
<h4>Description of the Opportunity</h4>

8. Add Social Media Icons to the Bottom of Your Template

This is a little more HTML intensive, but you can use a single row HTML table to add a set of social media icons to the bottom of your email.

```
<table border="0" cellspacing="2">
<tr>
<td><a href="http://twitter.com/yourbrand"></a></td>
<td><a href="http://facebook.com/yourbrand"></a></td>
<td><a href="http://www.linkedin.com/company/yourID"></a></td>
<td><a href="https://plus.google.com/u/0/yourID/posts"></a></td>
</tr>
</table>
```

The result is a row of buttons below your signature:



9. Provide a Way for Recipients to Unsubscribe

Even though the numerical limitations of Salesforce mass emails mean that you're generally sending your mass emails to a warm audience, some of your recipients may want to opt out at some point. Salesforce's mass emailing feature does not provide an unsubscribe landing page, so you'll need to provide a brief instruction at the bottom of the email such as “Reply with Unsubscribe in the subject if you no longer wish to receive these emails”. You'll then be responsible for manually flagging the Lead or Contact for Email Opt Out.

By following best practices such as these, you can improve the results of targeted mass emails that originate from within Salesforce. Custom Salesforce email templates give you the highest measure of control from among the template types.

Note: you can access Salesforce templates within Gmail or Office 365 email with [Cirrus Insight](#).