

# SALESFORCE

YOUR EMAIL INSTALLATION GUIDE

# Installing your email signature in SALESFORCE

Please have your provided HTML file available and ready to install. Then simply follow the steps below to have your signature set-up in Salesforce within minutes.

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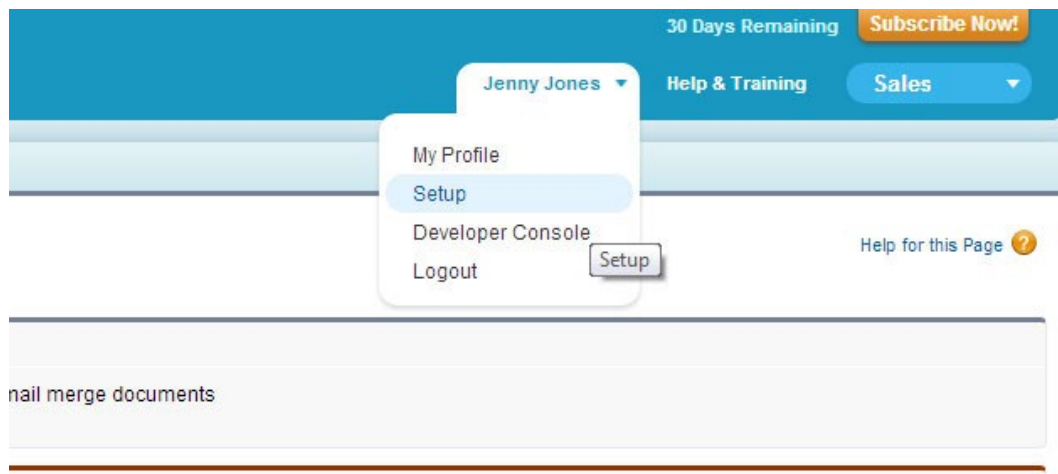
## STEP ONE

Login to your Salesforce account.

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## STEP TWO

First you need to create a new Letterhead. Go to your name in the top toolbar, then click on Setup.



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### STEP THREE

Click on Communication Templates from the new menu on the left, then click on Letterheads.

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize
- Create
- Develop
  - Schema Builder
  - Installed Packages
  - AppExchange Marketplace
  - Critical Updates

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Communication Templates
  - Letterheads
  - Email Templates
  - Mail Merge Templates
- Translation Workbench
- Data Management

Set up your Letterhead to standardize the look and feel of HTML email templates.

What is a Letterhead?

Create a Letterhead only once.

Select an email layout to format the body copy of your HTML email.

Don't show this page again

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### STEP FOUR

Click on Communication Templates from the new menu on the left, then click on Letterheads.

Quick Find

Expand All | Collapse All

Force.com Home

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Letterhead Properties

New Letterhead

Letterhead Edit

Save Cancel

Letterhead Properties

Available For Use

Letterhead Label jmys\_letterhead

Letterhead Unique Name jmys\_letterhead

Description

Save Cancel



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### STEP FIVE

Edit all of the available options including the Header, Footer, Top Line, Middle Line and Bottom Line and make every color white or #FFFFFF in the boxes available. Set the Height (in pixels) of the Header and Footer "0". This is important as you don't want any extra lines or colors on your nice email signature! Now save your letterhead.

Letterhead Properties  
**amys\_letterhead**

Customize the look and feel of your Letterhead below. Use the Preview button to see your Letterhead in a separate window.

Save Preview Cancel



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## STEP SIX

Click on Communication Templates from the new menu on the left, then click on Letterheads.

Quick Find  Expand All | Collapse All

Force.com Home

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- Security Controls
- Communication Templates**
  - Letterheads
  - Email Templates**
  - Mail Merge Templates

### My Personal Email Templates

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template used.

Folder: My Personal Email Templates [Create New Folder](#)

[New Template](#)

Action	Email Template Name	Template Type	Av
<a href="#">Edit</a>   <a href="#">Del</a>	amis_signature	HTML	
<a href="#">Edit</a>   <a href="#">Del</a>	email_signature	HTML	

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## STEP SEVEN

Choose HTML (using Letterhead) from the options.

Home Getting Started Contacts Accounts Leads Opportunities Forecasts Reports Dashboards Chatter Files +

Quick Find  Expand All | Collapse All

Force.com Home

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### Email Template New Template

Step 1. Email Template: New Template

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

- Text
- HTML (using Letterhead)**
- Custom (without using Letterhead)
- Visualforce



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## STEP EIGHT

Choose the "Personal Email Templates Folder", tick the Available for Use checkbox, give your template a new name and unique name, make sure to select the Letterhead that we just created and under Email Layout and select the Formal Letter option. See image below for exact requirements.

**Email Template Information**

Folder: My Personal Email Templates

Available For Use:

Email Template Name: Amys\_Email\_Signature

Template Unique Name: Amys\_Email\_Signature

Letterhead: amys\_letterhead

Email Layout: Formal Letter (View Email Layout Options)

Encoding: Free Form Letter (Form Europe (ISO-8859-1, ISO-LATIN-1))

Description: Formal Letter

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## STEP NINE

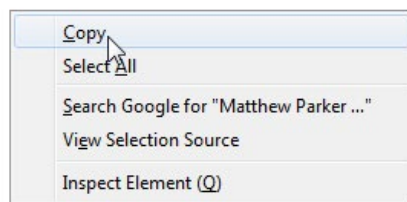
Open the provided Email Signature is open in your web browser, press CTRL + A (Command + A for Mac) to highlight the signature, then press CTRL + C (Command + C for Mac) to copy the signature.

**Matthew Parker**  
Lead Game Designer



**Edge Interactive**  
Where gaming grows

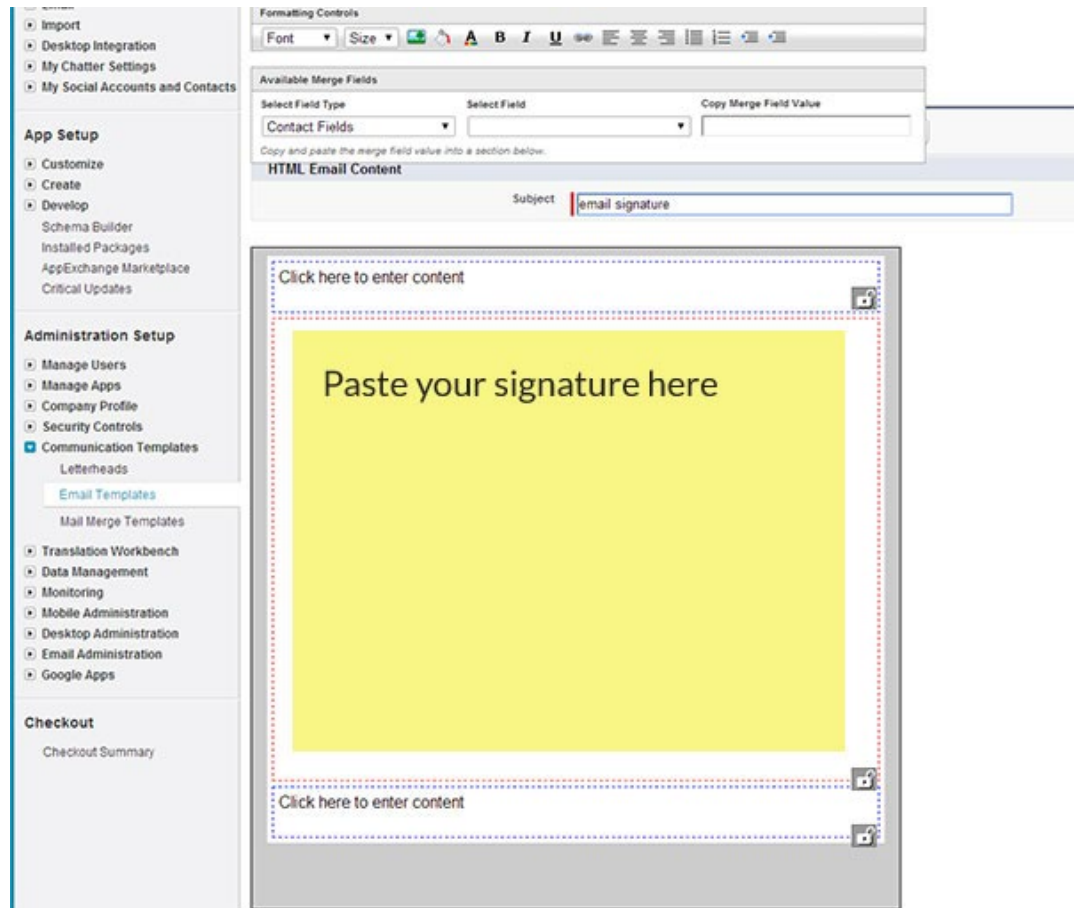
t. 311-611-3111  
f. 722-422-8333  
m. 611-311-6111  
a. 37 Saints Boulevard, Los Santos  
p. 55 Saints Boulevard, Los Santos  
e. matt@edgeinteractive.com  
w. edgeinteractivegaming.com



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### STEP TEN

Now go back to Salesforce. Paste your email signature using Ctrl + V for PC (Command + V for Mac) in the middle box as shown below.



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## STEP ELEVEN

Once you have correctly pasted your email signature you should see it like below. Give your template a subject and save.



The screenshot shows the 'Email Template Information' form in Salesforce. The form fields are as follows:

- Folder: My Personal Email Templates
- Available For Use:
- Email Template Name: |Amys\_Email\_Signature|
- Template Unique Name: |Amys\_Email\_Signature|
- Letterhead: amys\_letterhead
- Email Layout: Formal Letter (dropdown menu is open showing options: Formal Letter, Promotion (Right), Promotion (Left), Newsletter, Products))
- Encoding: --None-- (dropdown menu is open showing options: --None--, Free Form Letter, m Europe (ISO-8859-1, ISO-LATIN-1))
- Description: (empty text field)

All done! Your email signature is now installed within Salesforce!

