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Create and Share an	Email	Template
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Salesforce Email templates are available to members of your business unit. Any user can create an email template, and you can create and share as many templates as you like.

<u>Click here to learn how to copy a template and create a new one.</u>

After logging into CRM, click the **9-dot menu** in the upper left-hand corner, then enter "Email Template" in the search field and **click on the search result**.

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If you have any email templates, they'll be displayed below. Create a new one by clicking **New Email Template** in the upper right-hand corner.



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Enter an **Email Template Name** in the first field. This is the name that displays when a user is searching for a template or looking through the email template list. In the **Related Entity Type** drop-down menu, select Case. Enter a description of the template in the **Description** field if desired.

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	Description	Folder		- 15	
	Provides overview of how to complete a check request	Private Email Templates	Select Folder		

Select your **business unit folder**. In this example, we're creating a template for Purchasing so we'll select UA-VPPF-PUR. After selecting the folder, click **Select Folder** on the second screen.

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The example below will automatically insert the Case Subject in the Subject line of the email and the Contact's first name in the opening line of the email.

Click Save to save your template.



The saved template is now available in your Email Templates list. Copy and create a new template by clicking the **down arrow** next to a template and selecting **Clone**.

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