



Creating Kick-Ass Lightning Email Templates



Theron Troxel
Open to Work



Hannah Horning
ArcherPoint, Salesforce &
Pardot Administrator



Thanks To Our Incredible Sponsors!

SERCANTE

salesforce

stensul

PFL

 **GRIDMATE**

THE SPOT
by SERCANTE

FÍONTA



Agenda

- Live Demo
- Advanced Tips
- Top 4 Takeaways
- Questions



Live Demo

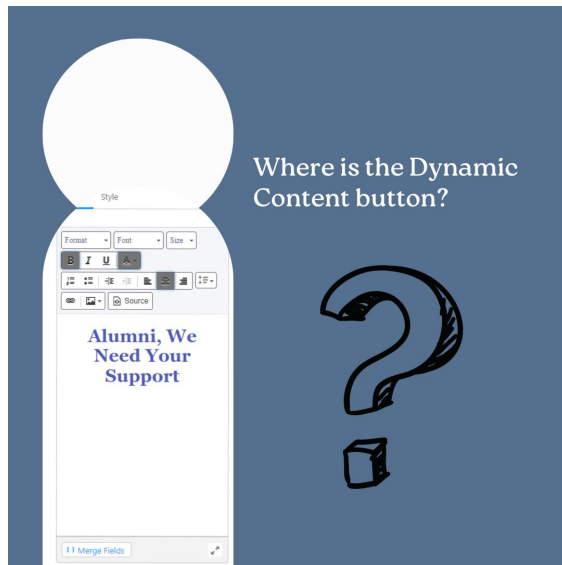


Advanced Tips



Using Dynamic Content

CHALLENGE: I can't use Dynamic Content in the Lightning Builder.

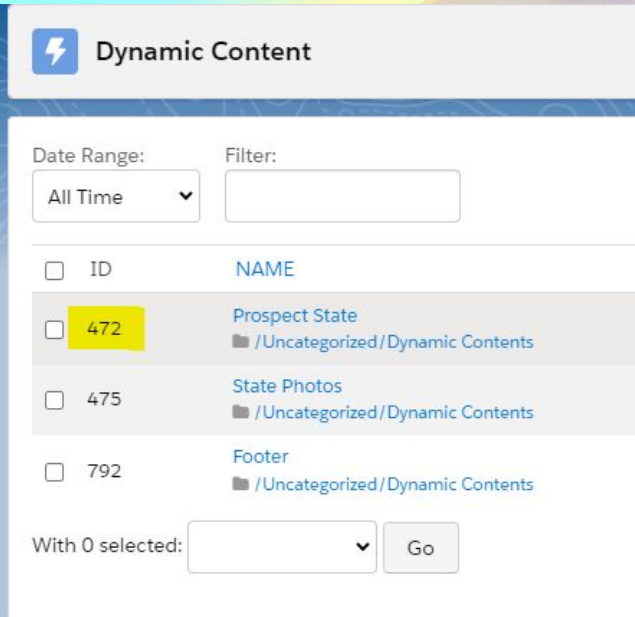


Using Dynamic Content

ADVANCED TIP #1: Dynamic Content CAN be added to Lightning templates.

1. Find your ID (*Content > Dynamic Content*)
2. Type **{{Dynamic_Content_ID}}** into your email template.

**View the changes in "Preview As" mode.*



The screenshot shows the Salesforce Dynamic Content management interface. At the top, there is a header with a lightning bolt icon and the text "Dynamic Content". Below the header, there are two input fields: "Date Range:" with a dropdown menu set to "All Time", and "Filter:" with an empty text box. The main content area is a table with columns for "ID" and "NAME". The table contains three rows of data:

ID	NAME
<input type="checkbox"/> 472	Prospect State /Uncategorized/Dynamic Contents
<input type="checkbox"/> 475	State Photos /Uncategorized/Dynamic Contents
<input type="checkbox"/> 792	Footer /Uncategorized/Dynamic Contents

At the bottom of the interface, there is a "With 0 selected:" label, a dropdown menu, and a "Go" button.

Using Dynamic Content

Alumni, We Need Your Support

Donors like you have a lasting impact on our students and community.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Egestas risus, nunc, ultrices est. Tortor, turpis pellentesque cursus ornare justo, nibh in venenatis. Faucibus mattis vulputate tristique nisl, malesuada.

{{Dynamic_Content_472}}

Alumni, We Need Your Support

Donors like you have a lasting impact on our students and community.

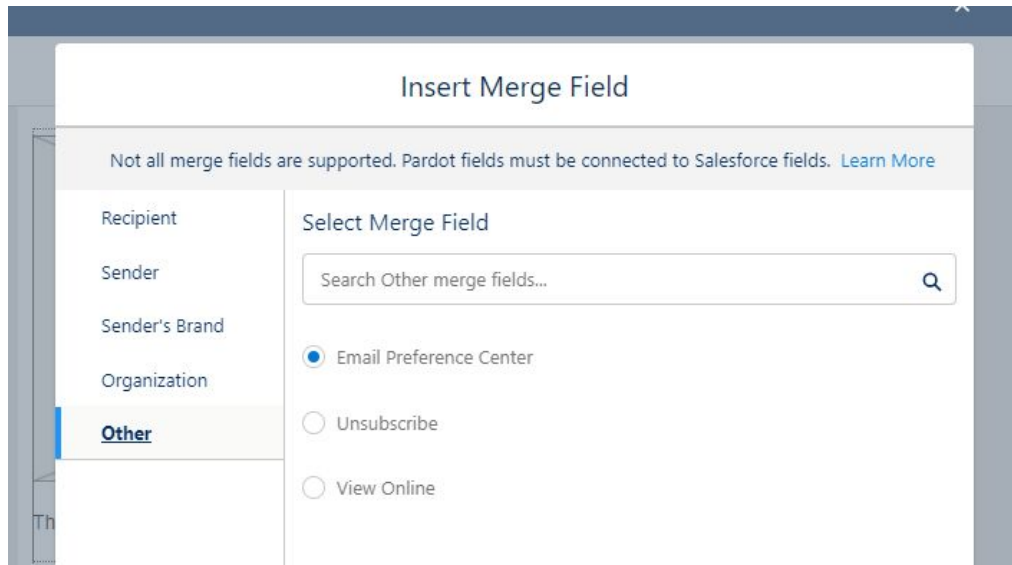
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Egestas risus, nunc, ultrices est. Tortor, turpis pellentesque cursus ornare justo, nibh in venenatis. Faucibus mattis vulputate tristique nisl, malesuada.

How are you doing in beautiful Florida!



Using Custom Preference Centers

CHALLENGE: I can't add a custom preference center to email templates.

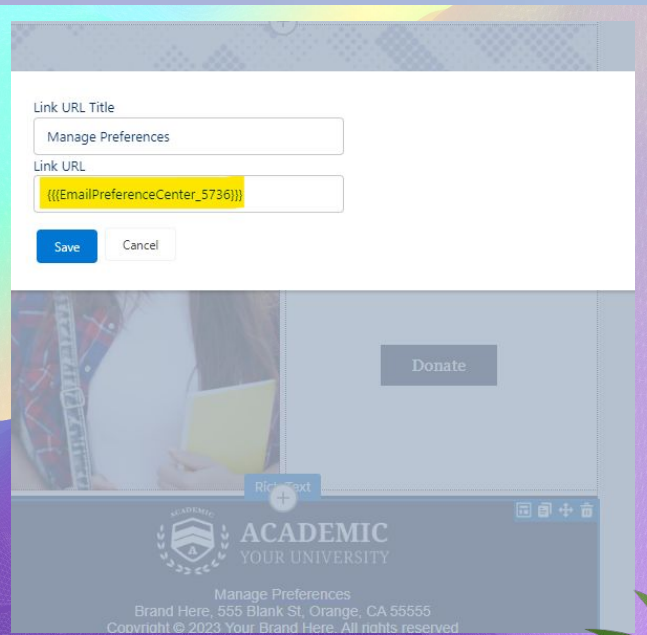


The screenshot shows a dialog box titled "Insert Merge Field". At the top, there is a note: "Not all merge fields are supported. Pardot fields must be connected to Salesforce fields. [Learn More](#)". Below this, there is a list of categories on the left: Recipient, Sender, Sender's Brand, Organization, and **Other** (which is selected). To the right of the "Other" category is a search bar labeled "Select Merge Field" with the placeholder text "Search Other merge fields...". Below the search bar are three radio button options: "Email Preference Center" (which is selected), "Unsubscribe", and "View Online".

Using Custom Preference Centers

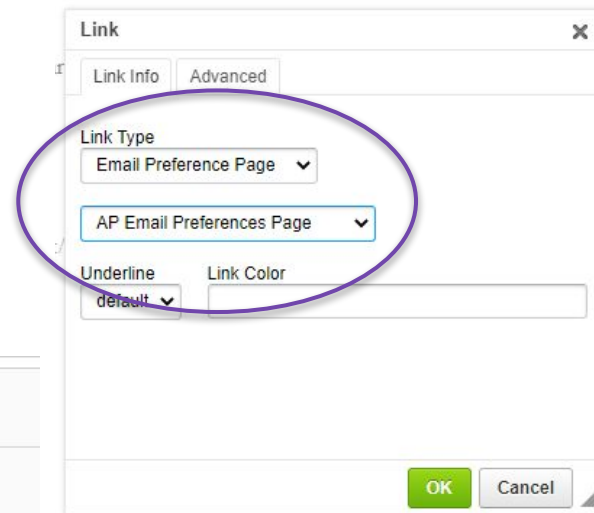
ADVANCED TIP #2: Custom preference centers CAN be added to Lightning templates.

1. Find your preference center ID (*see next slide*)
2. Hyperlink **{{{EmailPreferenceCenter_ID}}}** to anchor text in your email template



How to Find Your Preference Center ID

1. Open Account Engagement Email
2. Create an email draft
3. Add sample copy and create a link
4. Select **Link Type: Email Preference Page** and the correct preference page
5. Select OK and open the email HTML
6. Find your hyperlink and preference center ID



Link

Link Info | Advanced

Link Type

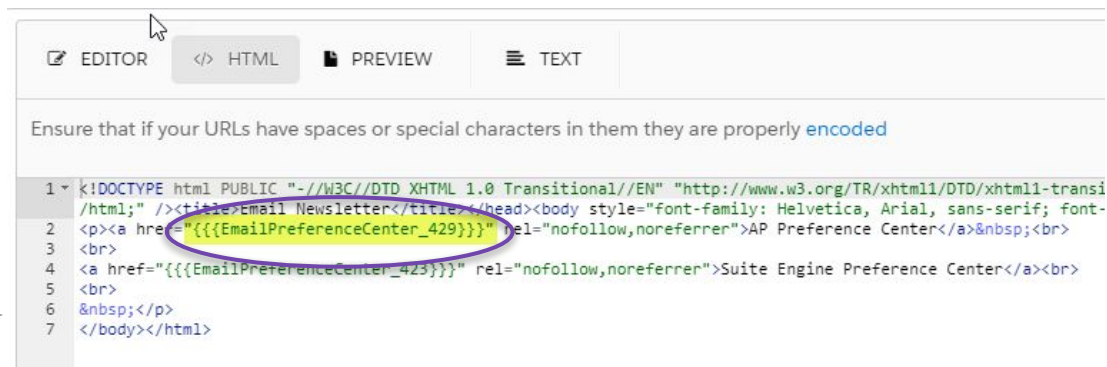
Email Preference Page

AP Email Preferences Page

Underline | Link Color

default

OK Cancel



EDITOR | HTML | PREVIEW | TEXT

Ensure that if your URLs have spaces or special characters in them they are properly [encoded](#)

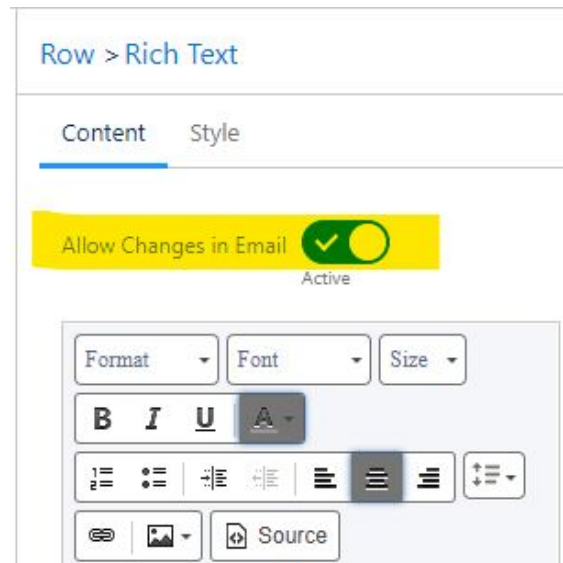
```
1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transi
2 /html;" /><title>Email Newsletter</title></head><body style="font-family: Helvetica, Arial, sans-serif; font-
3 <br>
4 <a href="{{EmailPreferenceCenter_429}}" rel="nofollow,noreferrer">AP Preference Center</a>&nbsp;<br>
5 <br>
6 <a href="{{EmailPreferenceCenter_423}}" rel="nofollow,noreferrer">Suite Engine Preference Center</a><br>
7 &nbsp;<br></p>
8 </body></html>
```

Locking Template Sections

CHALLENGE: Users can edit templates even when “Allow Changes in Email” is inactive.

ADVANCED TIP #3: This feature ONLY works in Salesforce, NOT Account Engagement.

Share locked templates with your Sales and BDR teams to use in Salesforce.

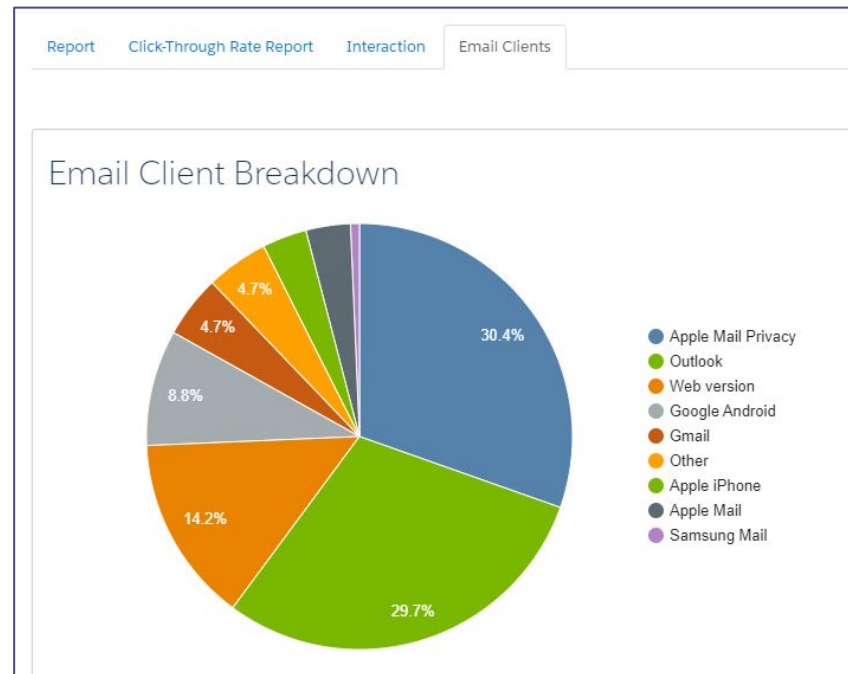


Testing

CHALLENGE: I can't use Litmus or Email on Acid to test my email templates.

ADVANCED TIP #4:

- In Account Engagement Reports, review several of your email reports.
- Determine which email clients are used by your audience.
- Test your email templates in as many clients as possible.



Hyperlinking Email Addresses

CHALLENGE: My email won't retain a subject when hyperlinking an email address.

Common Method (try this first):

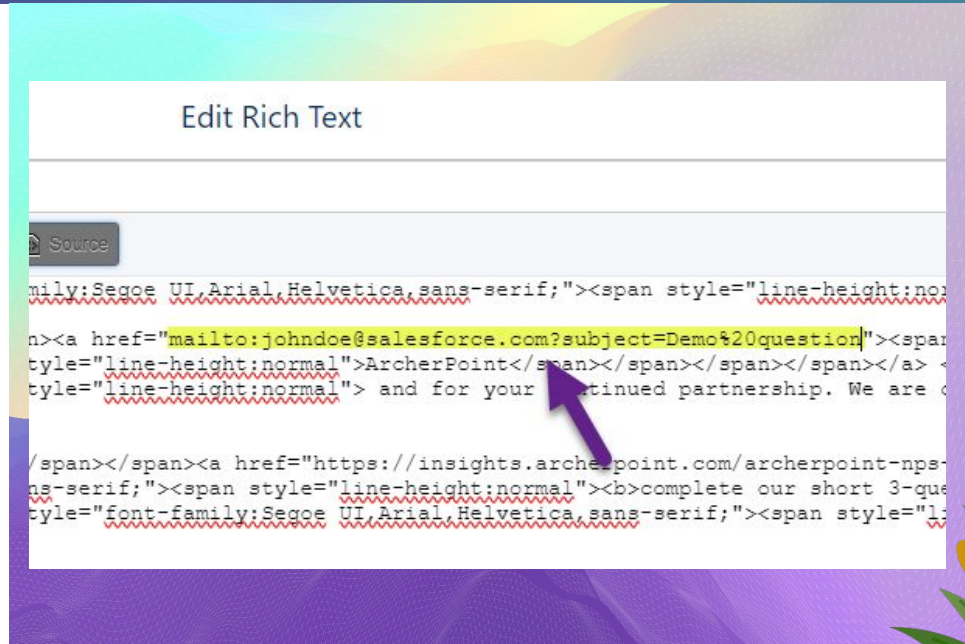
1. Hyperlink text using the following format:
 - `mailto:johndoe@salesforce.com?subject=Demo%20question`
2. Use %20 to represent spaces in Account Engagement

If that doesn't work, try the advanced tip on the next slide.

Hyperlinking Email Addresses

ADVANCED TIP #5:

1. Remove the existing hyperlink.
2. Create a new hyperlink and add a **placeholder URL, NOT the mailto.**
3. Open the email source code and replace the placeholder URL with the mailto.
4. Apply changes and test!

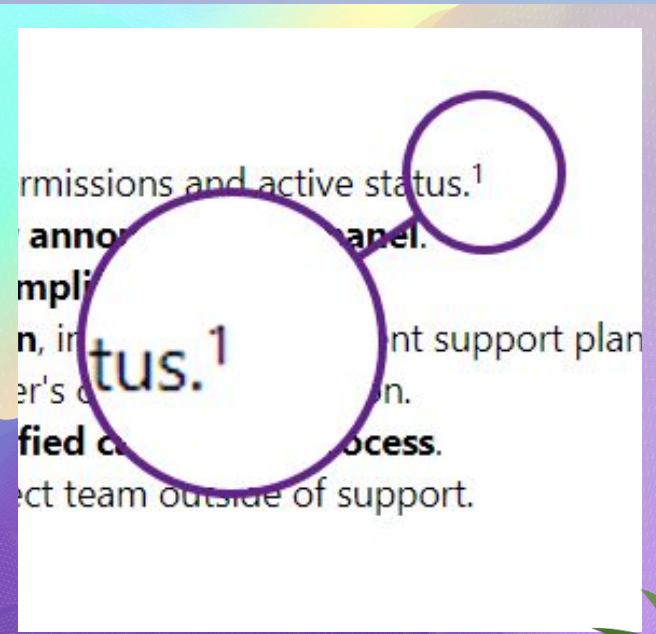


Superscripts and Subscripts

CHALLENGE: I can't add superscripts or subscripts in the Lightning Builder.

ADVANCED TIP #6: Adding superscripts and subscripts can be achieved with HTML.

In the HTML editor, use `` or `` around the text you want in super/subscript.



Optimizing Plain Text

ADVANCED TIP #7: Don't forget to optimize the plain text version of your email before hitting send.

Tips for creating attractive plain text emails:

- Remove image links and alt-text
- Remove extraneous information
- Remove extra spaces
- Emphasize sections and calls-to-actions with visual separators
- Standardize your style and use across all emails
- Be creative

Resource: <https://www.litmus.com/blog/best-practices-for-plain-text-emails-a-look-at-why-theyre-important/>



Optimizing Plain Text



Text Body

< <https://academicuniversity.com> >

Alumni, We Need Your Support

Donors like you have a lasting impact on our students and community.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Egestas risus, nunc, ultrices est. Tortor, turpis pellentesque cursus ornare justo, nibh in venenatis. Faucibus mattis vulputate tristique nisl, malesuada.

Donate < <https://academicuniversity.com/donate> >

Your support helps us:

[Image alt text: horizontal rule]

01.

[Image alt text: circle with a checkmark]

Offer More Scholarships

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lacus vitae enim suspendisse.

Unedited Text

Text Body

**** Alumni, We Need Your Support ****

Donors like you have a lasting impact on our students and community.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Egestas risus, nunc, ultrices est. Tortor, turpis pellentesque cursus ornare justo, nibh in venenatis. Faucibus mattis vulputate tristique nisl, malesuada.

Donate < <https://academicuniversity.com/donate> >

**** Your support helps us: ****

01. Offer More Scholarships
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lacus vitae enim suspendisse.

01. Offer More Scholarships
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lacus vitae enim suspendisse.

01. Offer More Scholarships
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lacus vitae enim suspendisse.

**** Happy Together! ****

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Adipiscing consequat, cursus platea at nec vestibulum amet. Ullamcorper congue proin cursus mi feugiat sodales arcu leo aliquam.

Edited Text



HTML Resources

- W3Schools - <https://www.w3schools.com/html/default.asp>
- Chat GPT - <https://chat.openai.com/>
- HubSpot's HTML and CSS Beginner Guide - <https://offers.hubspot.com/html-and-css-for-marketers>
- Sercante's Code School for Marketers (Advanced) - <https://www.sercante.com/pardot-training/code-school-for-pardot-admins/>



Top 4 Takeaways

1. **Embrace the Lightning Builder:** Overcome your hesitation to explore the Lightning Builder.
2. Even as a Beginner: **Don't shy away from HTML**, even if you're new to it.
3. **Implement the 80/20 Rule:** Opt for a blend of 80% drag-and-drop and 20% HTML for customization.
4. **Prioritize Testing:** Make testing a priority with a repeated emphasis – **Test, test, test!**



Thank You!

