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Creating Kick-Ass Lightning Email Templates

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Open to Work

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Agenda

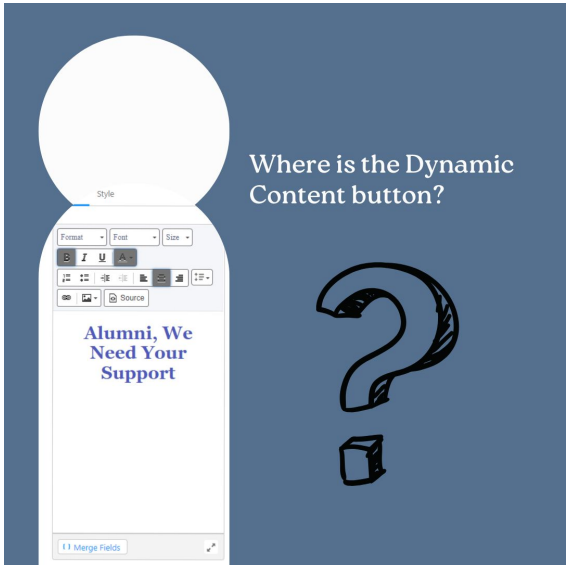
- Live Demo
- Advanced Tips
- Top 4 Takeaways
- Questions

Live Demo

Advanced Tips

Using Dynamic Content

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

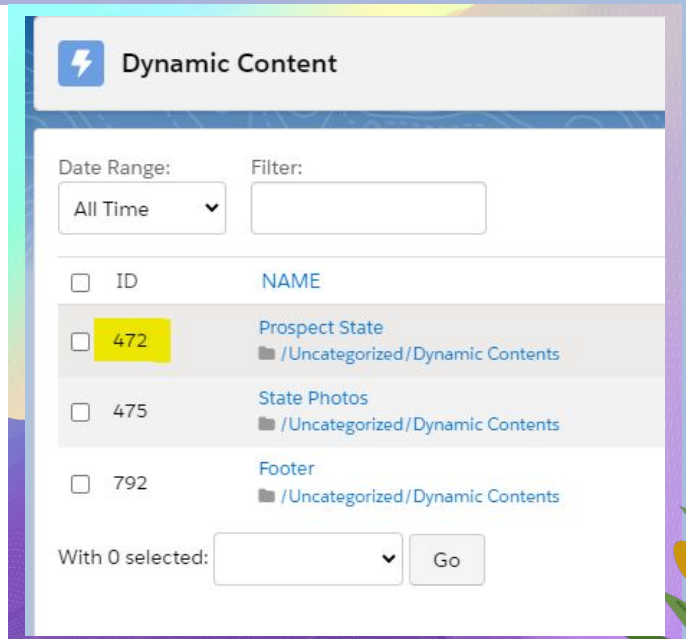


Using Dynamic Content

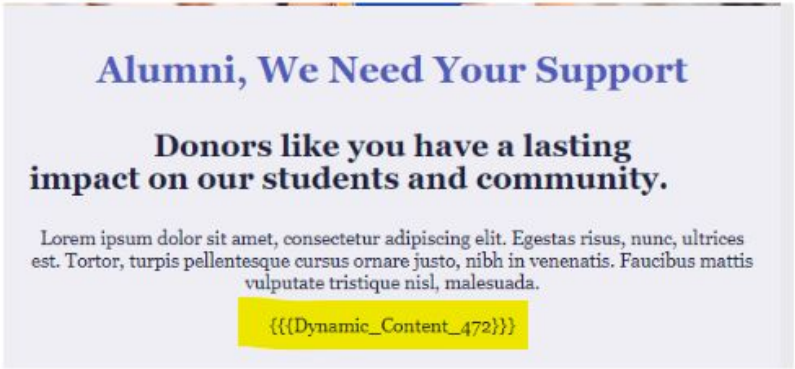
ADVANCED TIP #1: Dynamic Content CAN be added to Lightning templates.

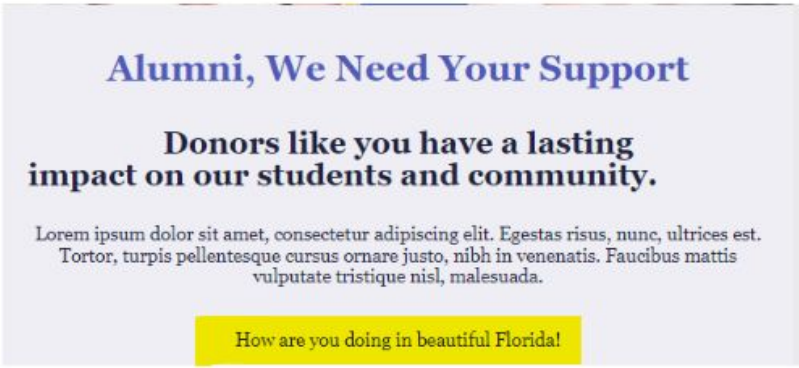
1. Find your ID *(Content > Dynamic Content)*
2. Type **{{Dynamic_Content_ID}}}** into your email template.

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



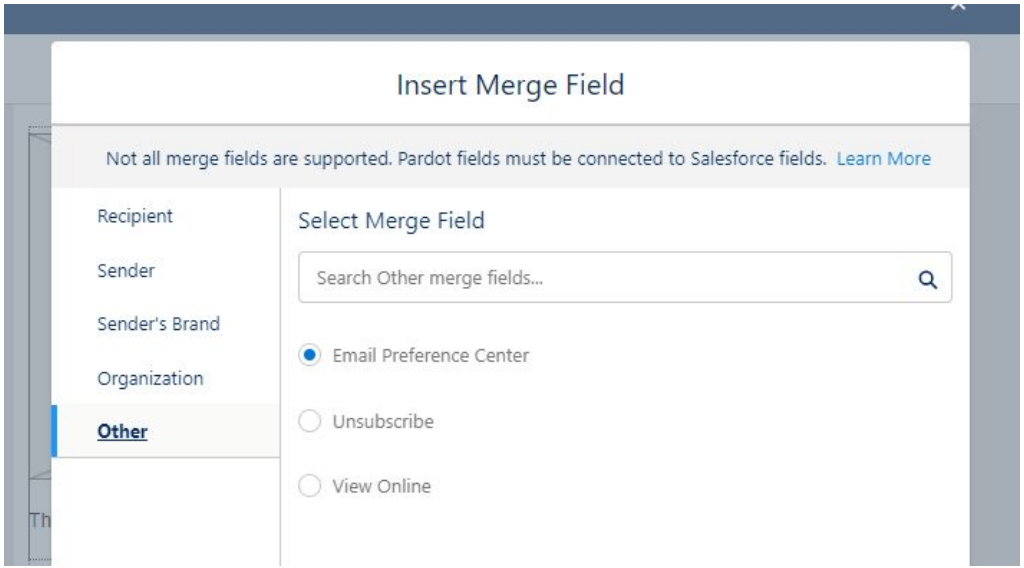
Using Dynamic Content





Using Custom Preference Centers

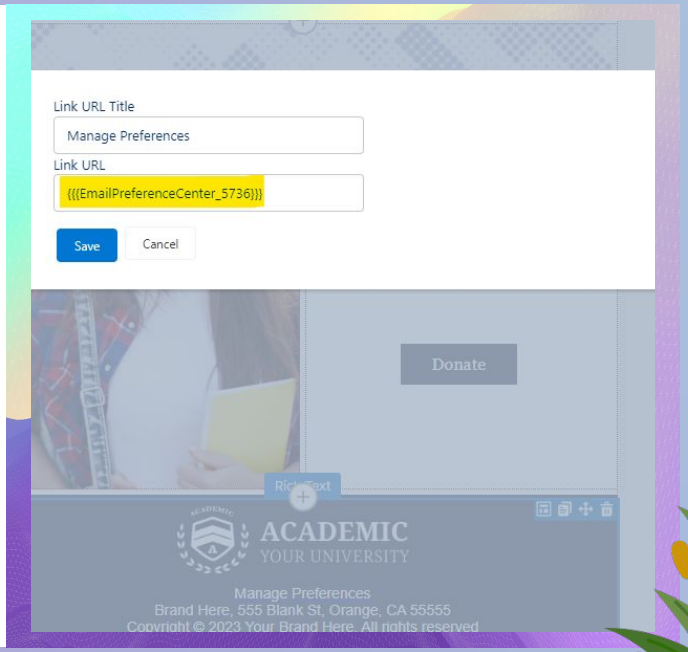
CHALLENGE: I can't add a custom preference center to email templates.



Using Custom Preference Centers

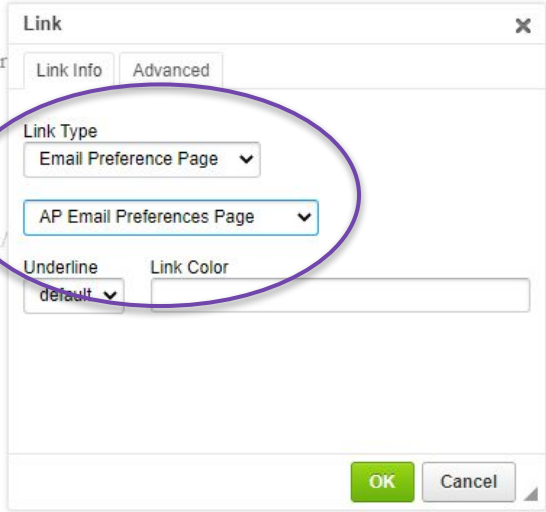
ADVANCED TIP #2: Custom preference centers CAN be added to Lightning templates.

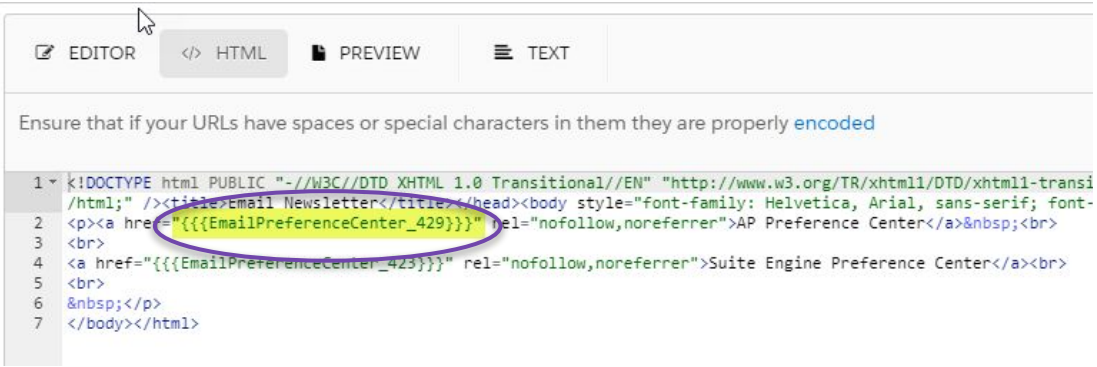
1. Find your preference center ID *(see next slide)*
2. Hyperlink **{{{EmailPreferenceCenter_ID}}}** to anchor text in your email template



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



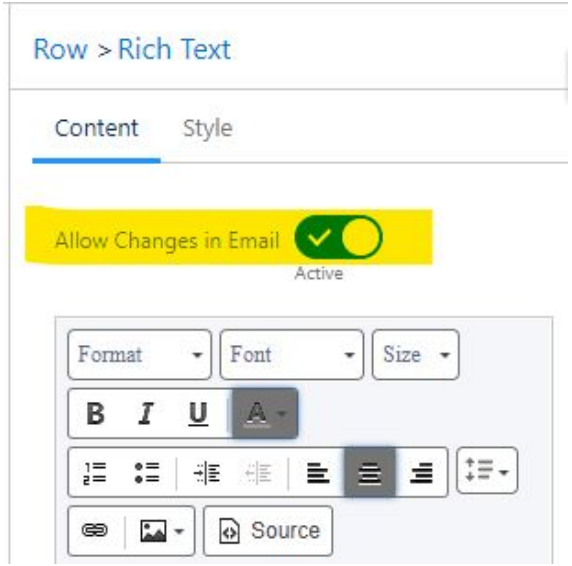


Locking Template Sections

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.

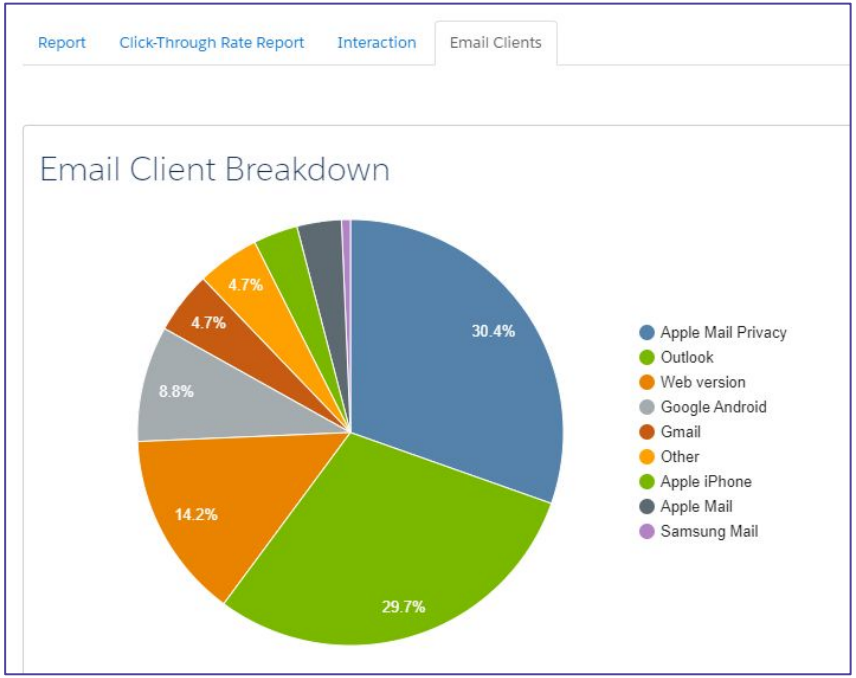


Testing

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):

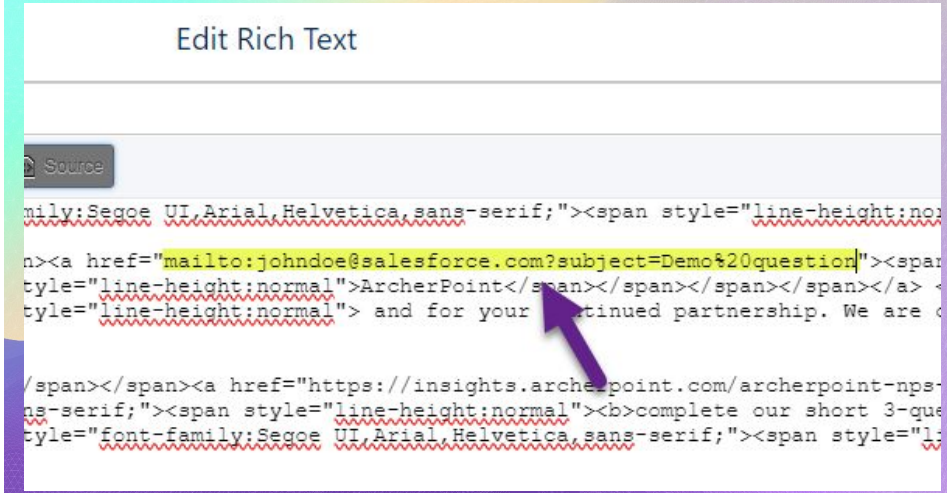
1. Hyperlink text using the following format:
    - mailto:johndoe@salesforce.com?subject=Demo%20question
2. Use %20 to represent spaces in Account Engagement

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!

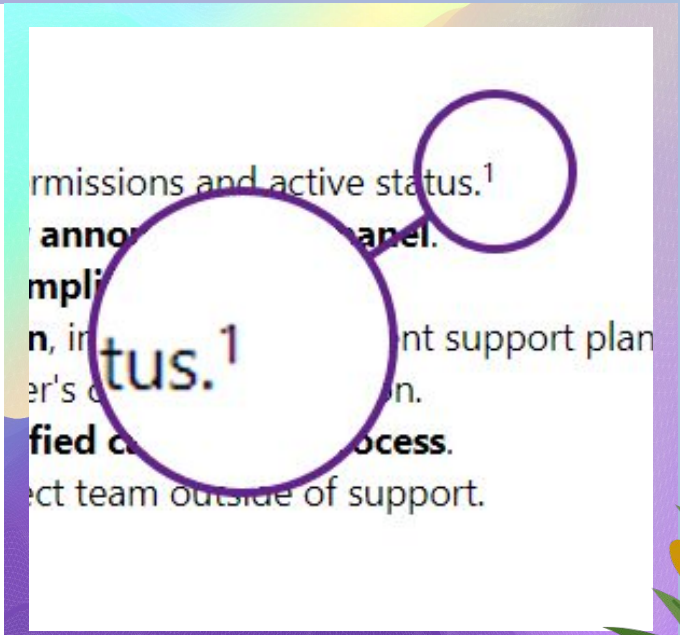


Superscripts and Subscripts

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

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Text Body

< https://academicuniversity.com >

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Text Body

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** Happy Together! **

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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/

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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!