Comtrade Three-Sixty

CASE STUDY

Streamlining Salesforce

with Comtrade 360's Breakthrough in Email Template Management

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At a glance:

Effectively managing email templates in Salesforce is a critical component for maintaining streamlined communication in organizations. Many organizations face the challenge of an overabundance of templates, leading to operational clutter and inefficiency. This case study underscores Comtrade 360's proficiency in solving complex email template management issues within Salesforce. Our custom-developed solution significantly simplified the client's email template system. By implementing custom objects, Apex logic, and intuitive interfaces, we not only organized the template system but also provided valuable insights into its usage. This strategic approach led to enhanced communication efficiency and streamlined internal processes. Our commitment to providing specialized, client-centric solutions is evident in how we transformed the Salesforce experience for our client, ensuring their system is both effective and easily manageable.

About

Organizations utilize Salesforce for client communication across various departments, including Sales, Marketing, Support, and others. Primarily, organizations communicate with clients through phone calls and email messages. To streamline communication, many organizations use email templates for generic responses. However, in large organizations with numerous departments and teams, the volume of templates can become unmanageable.

Often, organizations accumulate hundreds of templates, many of which may be inactive. Identifying which email templates are actively used by organizational staff and which ones are not presents a challenge. This lack of control can be a consequence of the absence of a default built-in feature in Salesforce designed to measure this information.

In such cases, organizations may need to explore custom solutions or third-party applications to effectively manage and track the usage of email templates.

Problem

One of our clients faced the same problem. The client had produced around **650+ email templates,** most of which were not in use. The client's request was to remove templates that had been inactive for a while. Salesforce also lacked a feature to measure email template usage. Consequently, we were compelled to find a solution for this specific issue.

Analyse Market and possible solutions

The initial phase involved searching for existing solutions, third-party apps that could provide the necessary features to measure Salesforce Email Template usage details. Unfortunately, the market did not offer such applications. There were only custom solutions and queries that returned **'All time'** usage for each email template but without any further details. Based on the given options, we started developing a custom feature to measure Email template usage.

Approach to the problem

There is a standard object called **'EmailTemplate'**, which contains details about email templates, including information on how many times a template was used and when the email template was last sent. In our custom solution, we not only leveraged some information from this object but also added new data points for more detailed monitoring.

Industry

CRM and Salesforce Solutions

Technology

- Apex
- Apex APIs
- Visualforce & lightning
- SOQL
- Workflow automation
- Custom applications
- Analytics and reporting
- Integration solutions

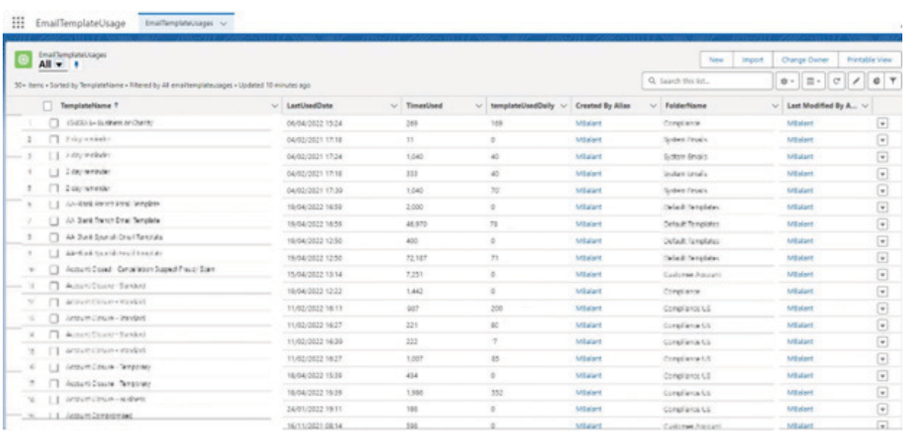
1. Create Custom Object and Custom (Apex) Logic

To monitor email template usage details on a daily, weekly, monthly, and yearly basis, a custom object was created for gathering such information. For gathering email template usage details, we implemented Apex logic that automatically calculates usage details daily if an email template was used by anyone.

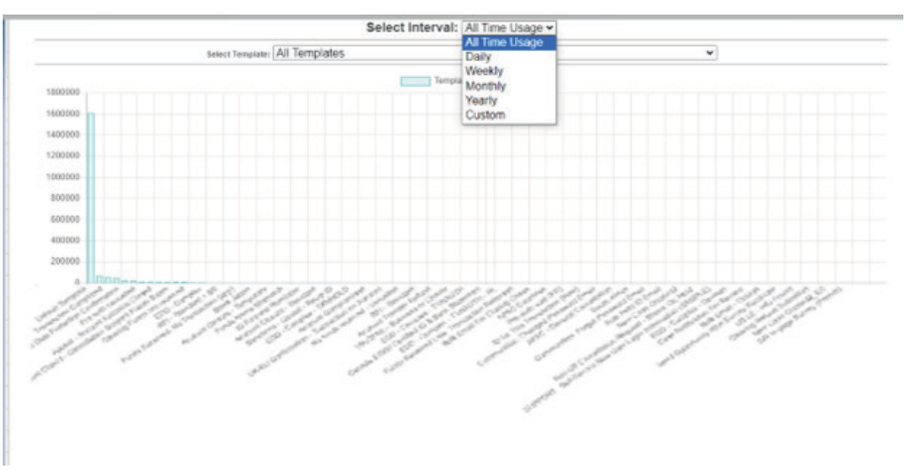
When information gathering began, our next step was to present it in a user-friendly way.

2. Create new Application and Implement Visual Force page

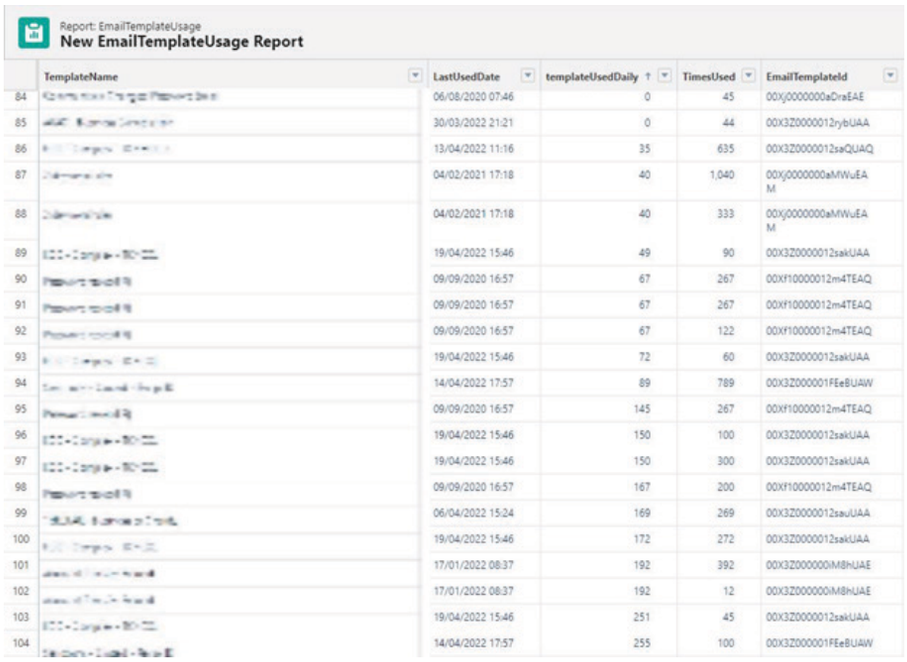
We created a new application page where details about email template usage were shown.



In the next phase, we implemented a **'Visualforce'** page and an **'Apex controller'** to present data more visually. The email template usage can be filtered by name and by specific intervals (daily, weekly, monthly, yearly, and custom period).



Reports can also be created based on this custom object data.


Report: EmailTemplateUsage
New EmailTemplateUsage Report

	TemplateName	LastUsedDate	templateUsedDaily	TimesUsed	EmailTemplateId
84		06/08/2020 07:46	0	45	00Xj0000000aDraEAE
85		30/03/2022 21:21	0	44	00X3Z0000012rybUAA
86		13/04/2022 11:16	35	635	00X3Z0000012saQUAQ
87		04/02/2021 17:18	40	1,040	00Xj0000000aMWuEAM
88		04/02/2021 17:18	40	333	00Xj0000000aMWuEAM
89		19/04/2022 15:46	49	90	00X3Z0000012sakUAA
90		09/09/2020 16:57	67	267	00Xf10000012m4TEAQ
91		09/09/2020 16:57	67	267	00Xf10000012m4TEAQ
92		09/09/2020 16:57	67	122	00Xf10000012m4TEAQ
93		19/04/2022 15:46	72	60	00X3Z0000012sakUAA
94		14/04/2022 17:57	89	789	00X3Z000001FEeBUAW
95		09/09/2020 16:57	145	267	00Xf10000012m4TEAQ
96		19/04/2022 15:46	150	100	00X3Z0000012sakUAA
97		19/04/2022 15:46	150	300	00X3Z0000012sakUAA
98		09/09/2020 16:57	167	200	00Xf10000012m4TEAQ
99		06/04/2022 15:24	169	269	00X3Z0000012sauUAA
100		19/04/2022 15:46	172	272	00X3Z0000012sakUAA
101		17/01/2022 08:37	192	392	00X3Z000000iM8hUAE
102		17/01/2022 08:37	192	12	00X3Z000000iM8hUAE
103		19/04/2022 15:46	251	45	00X3Z0000012sakUAA
104		14/04/2022 17:57	255	100	00X3Z000001FEeBUAW

Results

With this app, organizations could regularly monitor email template usage. After a couple of weeks, as the email template usage numbers became clearer, the client began removing unused templates and successfully reduced the number of email templates from 650+ to under 100.

Conclusion

The successful management of email templates in Salesforce is crucial for maintaining efficient client communication and organizational coherence, especially in large enterprises with diverse departments. This was vividly demonstrated in our recent project, where Comtrade 360 adeptly tackled the challenge of unwieldy email template usage for a client. Our engagement not only streamlined the client's email communication process but also underscored the value of specialized intervention in handling complex Salesforce environments.

By meticulously developing a custom solution for tracking and managing email templates, Comtrade 360 delivered a system that significantly reduced clutter and enhanced operational efficiency. The ability to monitor template usage across various timeframes and the implementation of a visually intuitive interface exemplify our commitment to providing solutions that are both innovative and user-friendly. The reduction of email templates from over 650 to fewer than 100 not only simplified the client's workflow but also led to a noticeable improvement in communication effectiveness.

This project is a prime example of how Comtrade 360's expertise extends beyond mere technical support. We offer strategic insights that transform our clients' Salesforce experience, tailoring solutions to their unique business contexts. Our approach in this scenario — shifting from a reactive to a proactive stance in template management — demonstrates our understanding of the dynamic nature of client communication and our ability to foresee and solve potential issues before they escalate.

By entrusting Comtrade 360 with their Salesforce challenges, clients gain a partner who is committed to delivering customized, scalable, and efficient solutions. Our dedicated team, with its deep expertise in Salesforce, ensures that our clients can focus on their core business activities, confident in the knowledge that their Salesforce environment is optimized for peak performance and future readiness.

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