



Quick Text Job Aid

Activating Quick Text in Salesforce 2.2

1. In the upper left corner, click the 9 dots in the shape of a square under the Salesforce blue cloud
2. Type, “quick text” in the Application Launcher search bar
3. Click to show all items within “All Items” and click, “Quick Text”

Making your first Quick Text

1. In the upper right side, click “New Quick Text”
2. Within the windows that appears, name the Quick Text with a title that will be easy to find with key words. (Ex) Apple Cancel for instructions to give a customer how to cancel a DAZN Apple subscription.
3. The “Insert Merge Field” allows adding Apex code to the quick text to add things such as the customer’s name from the account using the code, `{!Account.Name}` or the customer’s first name with the code, `{!Account.FirstName}` To find such fields, click the “Choose” arrows and choose from the list. To find the account name code, go to “Account” under the “Related To” drop-down and “Account Name” or “First Name” under the “Field” drop-down
4. “Personal” or “Shared” under “Category” (Please note that only leads can share their Quick Text at this time.
5. Then choose where this Quick Text will be available: Chat only, Email only or both chats and emails
6. Click “Save” to save the Quick Text
7. With an existing Quick Text, you can clone it and change its title; while keeping the other parameters intact, as a quick way to make a new Quick Texts

How to access Quick Text during a live chat or email case

1. Click within the text area
2. Hold the control key on your keyboard and type the “period” key
3. Using the Quick Text search bar, enter the keyword(s) of the desired Quick text.

Modifying and changing a Quick Text

1. It is suggested that you add Quick Text to “My Favorites” in Salesforce by clicking the “star” in the upper right of the Salesforce window.
2. Open Quick Text and choose the one you want to change or modify.
3. Click the “Edit” button in the upper right of the Salesforce window
4. Make the changes and save.