

Error Using Email Template -You can't send an email to a lead when there's a value in the Related To field. Remove the lead or the Related To entry.

06/06/2024 10:32 am EDT

Description of Issue:

When sending emails via Salesforce using any email template, the following error is received:

'You can't send an email to a lead when there's a value in the Related To field. Remove the lead or the Related To entry.'

□

This is caused by selecting a lead record to send the email to vs a contact record.

Fixes:

Often a contact will have multiple contact records. Make sure to select the record type of contact and not a lead record. The icons below indicate the contact status:

☐Contact

☐Lead

You may only see multiple records if the full name is entered. If only one record is found, that record will need to be updated to contact status vs a lead, or a new contact record added to the customers account.