
Salesforce Training

Emailing in Salesforce

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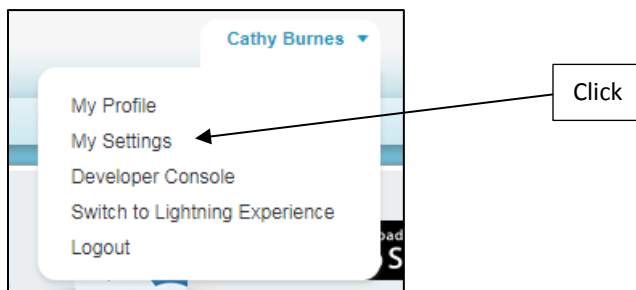
1 Overview

The following steps will help assist creating a new email template in Salesforce that can be used to send mass email to mail group members and contacts.

2 Creating an Email Template

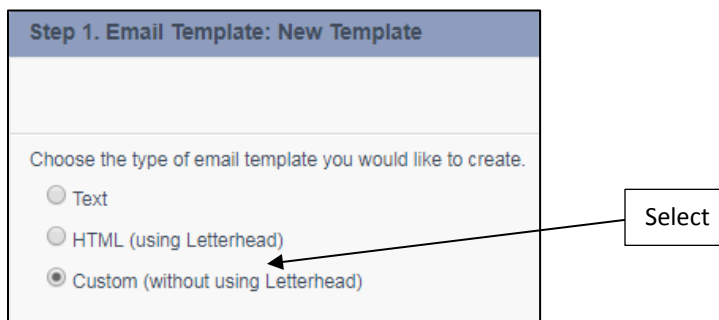
Complete these steps in order to create an email template.

1. Log in to Salesforce, and select your name from the top right corner of the page.
2. Click **My Settings**.



3. Click the **New Template** button.
4. Select the **Text** radio button to create an email template that is just a message. If you have an HTML template ready, select the **Custom (without using Letterhead)** radio button.

Note: In this example, we'll continue with creating a Custom template using HTML.

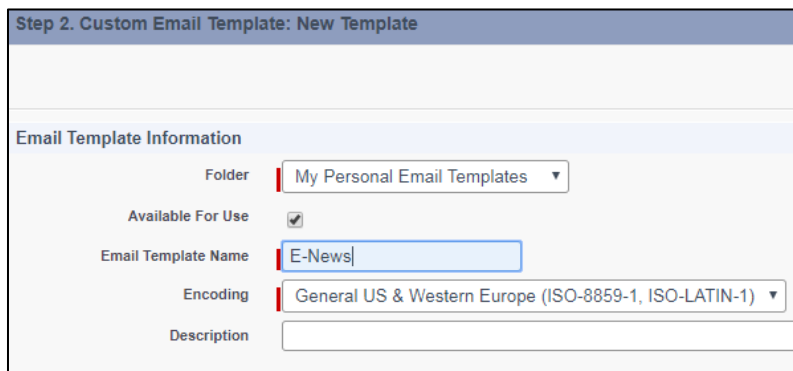


5. Click **Next**.

6. Select **My Personal Email Template** from the **Folder** drop-down menu to keep your template private, or select **Unfiled Public Email Templates** to share your template publicly.
7. Click the box next to the **Available For Use** field so that it's selected.

Note: Your template will not be visible in mail groups unless you select this option.

8. Enter a name for your template into the **Email Template Name** field, and then click **Next**.



Step 2. Custom Email Template: New Template

Email Template Information

Folder | My Personal Email Templates ▾

Available For Use |

Email Template Name | E-News

Encoding | General US & Western Europe (ISO-8859-1, ISO-LATIN-1) ▾

Description |

9. Enter the title of your email into the **Subject** field.
10. You can then copy and paste the HTML text you have into the **HTML Body** field.
11. Click **Next**.
12. Click the **Copy text from HTML version** button to copy the text from the HTML. This is for people who may not be able to view HTML emails.
13. Click **Save**.
14. Make any changes to your template by clicking the **Edit HTML Version** or **Text Version** buttons.
15. Test how your template will look in an email by clicking the **Send Test and Verify Merge Fields** button. Click the checkbox next to **Send email preview to** so that it's selected and make sure your email address is in the box. Click **OK**.

3 Send a Mass Email to a Mail Group

Once you have a specified template ready to send out to a mail group, you can then use that template to send out a mass email to all of the members in your mail group.

1. Click **Mail Groups** from the top of the page to go to your mail groups. Select the mail group view for your county and click **Go**.
2. Click on the mail group that you want to send the mass email to.
3. Click the **Mass Email** button above the Mail Group Members section.
4. Select the folder that your template is located in from the **Email Template Folder** drop-down menu.
5. Select the email template from the **Email Template** drop-down menu.
6. Click the **Send Mass Email** button, and the email will be sent out to all of the members of the mail group.

Mass Emailing Contact/Lead List
4-H Advisory Council

You currently have 42 recipient(s) selected to receive this email.

Email Template Selection

Email Template Folder: My Personal Email Folder ▼

Email Template: E-News ▼

Email Processing Options

BCC me on one message

Store an activity for each message

Use my signature

Mass Email Name: Mass Email:4-H Advisory Co

Send Mass Email

Click