
Salesforce Training

Mail Groups

Contents

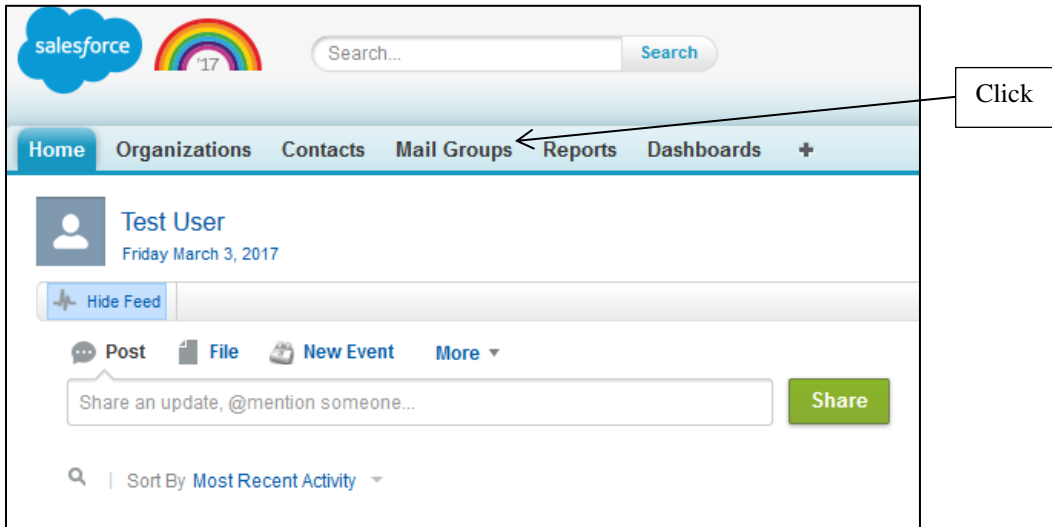
- 1 Overview3
- 2 View Mail Groups.....3
- 3 Add, Edit or Delete a Mail Group.....4
- 4 Remove a Mail Group Member5

1 Overview

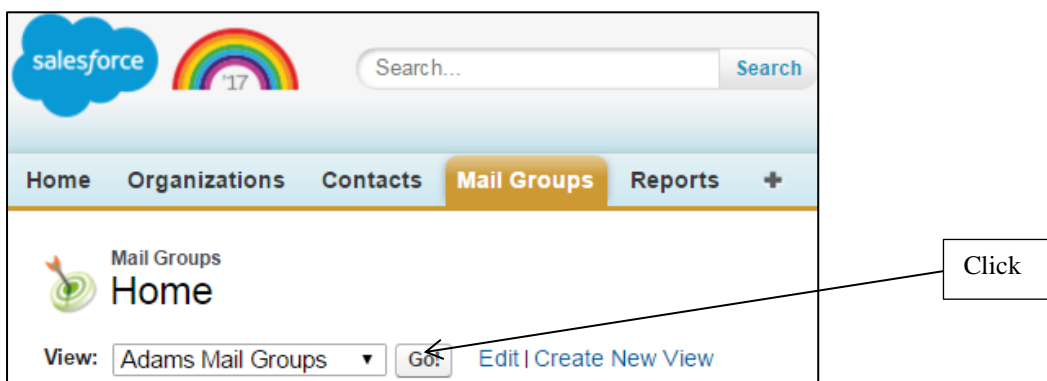
The following series of steps show how to view your county's mail groups in Salesforce. You will also learn how to add, delete, and edit mail groups.

2 View Mail Groups

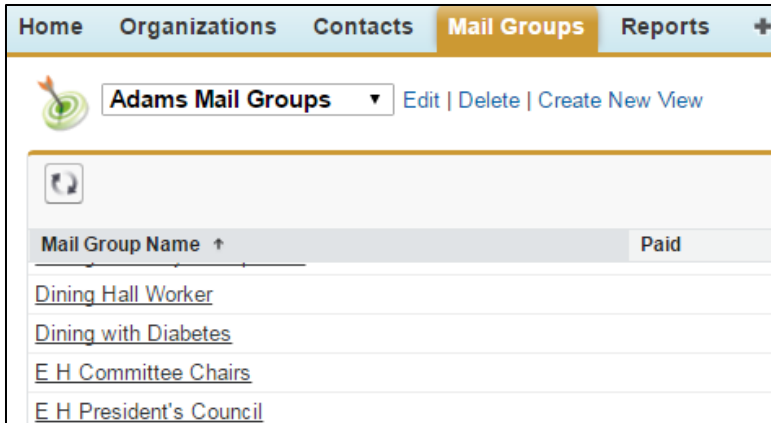
1. Log into Salesforce, and then click **Mail Groups** from the top menu.



2. Select your county's view from the **View** drop-down list if it is not already selected.
3. Click **Go**.



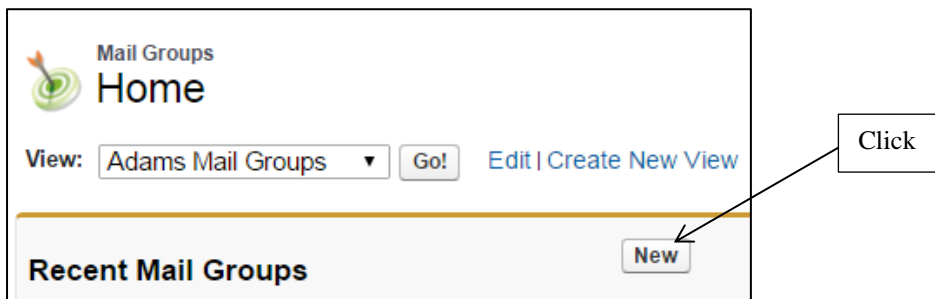
4. Click on the mailing list that you want to view.



5. View the information for the mailing list, and scroll down to view the members of the mail group.

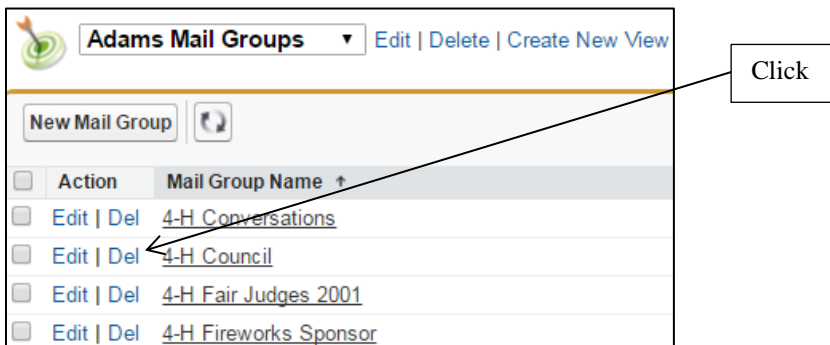
3 Add, Edit or Delete a Mail Group

1. Click on **Mail Groups** from the top menu.
2. Click the **New** button to create a new mailing list.



3. Enter a new name for your mailing list in the **Mail Group Name** field, and then fill out all other pertinent information.
4. Enter you county name in the **Account Name** field (ex. “Adams County”), and click the **Save** button when you are finished. You will then see your saved mail group.
5. Go back to the main Mail Groups page, and go to the view for your county by clicking **Go** at the top of the page.
6. Click **Edit** next to the mailing list you want to change any info for. After making any edits, click **Save**.

- Click **Del** next to the mailing list you want to delete to permanently remove it from your account.



4 Remove a Mail Group Member

- Go to a mail group, and scroll down to the **Mail Group Members** section.
- Click on any name in the member list to view that contact.
- Click **Edit** next to a mail group member to change any info for the member.
- Click **Remove** next to a mail group member to remove that member from the group.

The screenshot shows the 'Mail Group Members' interface. At the top, there is a 'Manage Members' dropdown menu. Below this is a table with columns for 'Action', 'Type', 'Status', 'First Name', and 'Last Name'. The members listed are David Scheurich, Nevo Culp, Kirk Smith, Byron Frieden, and Steve Waling. At the bottom, there are links for 'Show 5 more >' and 'Go to list (50) >'.

Action	Type	Status	First Name	Last Name
Edit Remove	Contact	Sent	David	Scheurich
Edit Remove	Contact	Sent	Nevo	Culp
Edit Remove	Contact	Sent	Kirk	Smith
Edit Remove	Contact	Sent	Byron	Frieden
Edit Remove	Contact	Sent	Steve	Waling

[Show 5 more >](#) | [Go to list \(50\) >](#)