
Salesforce

Emailing Contacts

Contents

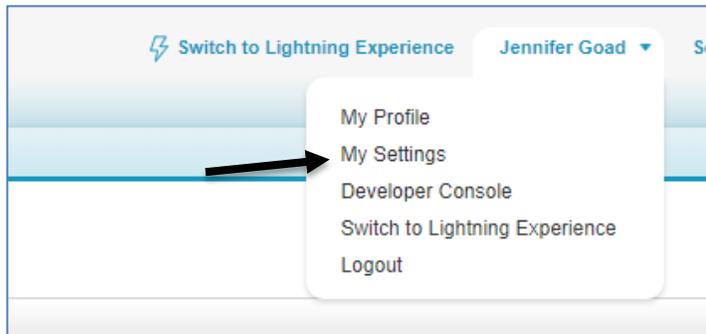
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1 Overview

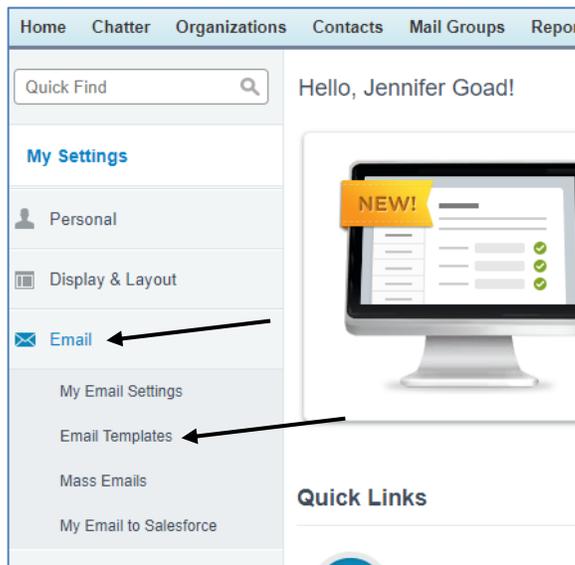
The following document outlines how to create a new email template in Salesforce and then how to use that template to send out a mass email to multiple contacts.

2 Create an Email Template

1. Start by clicking on your name in the upper right corner and going to **My Settings**.



2. On the left hand side you will click on **Email** and then **Email Template**.



3. The drop-down has folders where you can access Public Classic Email Templates or your Personal Email Templates. If you would like to create a new template simply click on the blue button in the middle of the screen that says **New Template**.

Action	Email Template Name ↑	Template Type	Available For Use	Description
Edit Del	Contact: Follow Up (SAMPLE)	Text	✓	Follow up on
Edit Del	DFFS_test_2	Custom	✓	
Edit Del	HE Council	Custom	✓	
Edit Del	Leads: New assignment notification (SAMPLE)	Text	✓	Internal notific
Edit Del	Leads: Web-to-Lead email response (SAMPLE)	Text	✓	Auto-respons
Edit Del	New Lead	Text	✓	

4. Choose which kind of email you would like to send and click **Next**.

Note: Typically, you will send text email, but you may also have the HTML code to paste into the pre-made newsletter. If that's the case, you can select **Custom (without using letterhead)**.

- Fill out the fields in red and make sure the **Available For Use** box is checked and click **Save**.

Use merge fields to personalize your email content. You can add substitute text to any merge field. Substitute text displays only if the merge record does not have a value (e.g., {!NullValue(Contact.FirstName)}). When you save the template, the merge field will appear in the email body of the template with the following syntax: {!NullValue(Contact.FirstName)}

[View Sample Template](#)

Note that the Description field is for internal use only. It will be listed as the title of any email activities you log when sending mass email.

Available Merge Fields

Select Field Type
Contact Fields

Select Field

Copy Merge Field Value

Copy and paste the merge field value into your template below.

Step 2. Text Email Template: New Template

Email Template Information

Folder: Unfiled Public Classic Email Templates

Available For Use:

Email Template Name: TEST

Template Unique Name: TEST

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

Description:

Subject: Test

Email Body:

Note: If you choose to create a custom template, you can paste existing HTML code into the **HTML** text box if you have that readily available. If you need to help with custom templates, please contact extsalesforce@purdue.edu.

3 Sending a Mass Email

After you've created an email template with the information in it that you want to send out then you can send a mass email to your contacts, leads, and mail groups.

For contacts or person accounts

On the **Contacts** tab, in the **Tools** section at the bottom of the page, click **Mass Email Contacts**.

If you use person accounts, the link also appears on the **Accounts** tab.

For Mail Groups

On the Mail Groups tab, select your Mail Group view and then go to the mail group you want to email. Click **Mass Email**, and then select the template you created. Click **Send Mass Email**.

For leads

On the **Leads** tab, in the **Tools** section at the bottom of the page, click **Mass Email Leads**.

Note: After you send out a mass email you'll receive an email letting you know if that the email was successful and if any addresses failed.