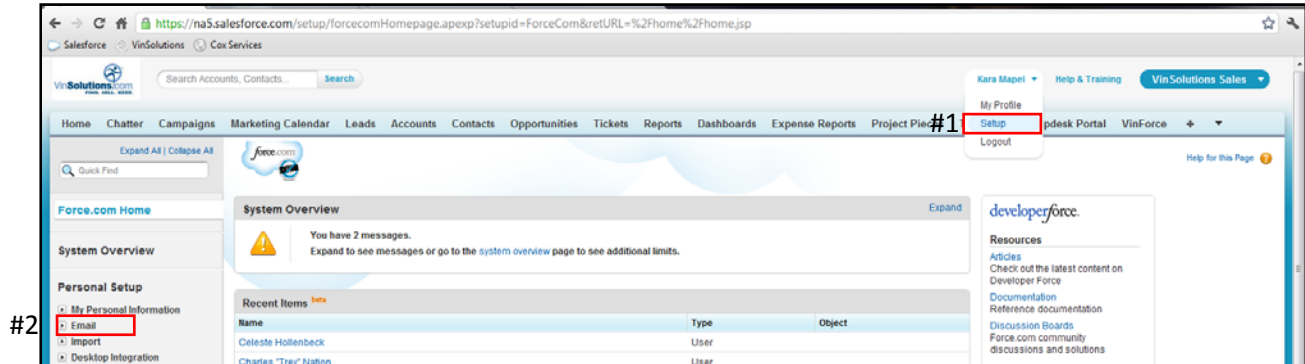
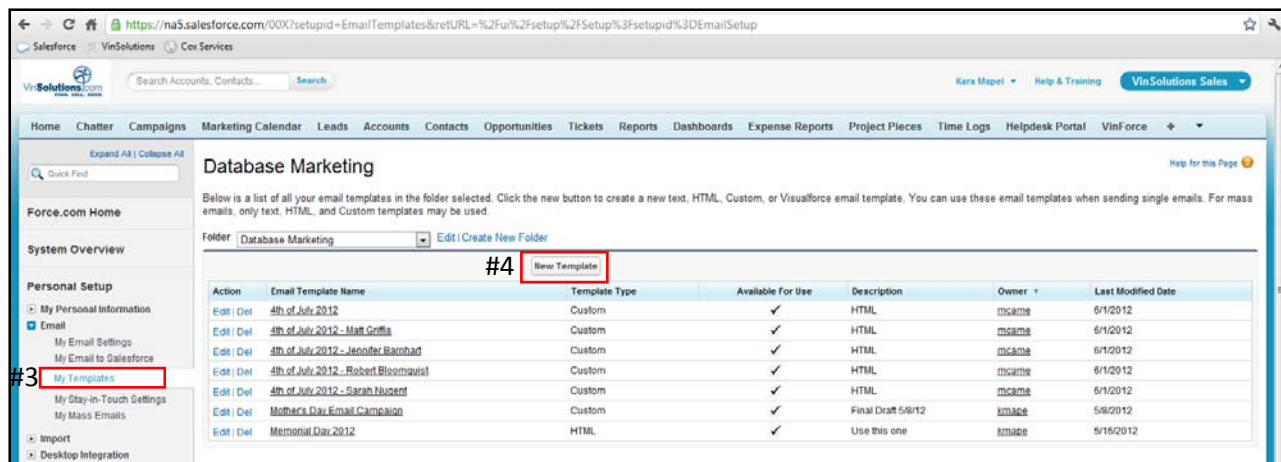


## Mass Email Steps

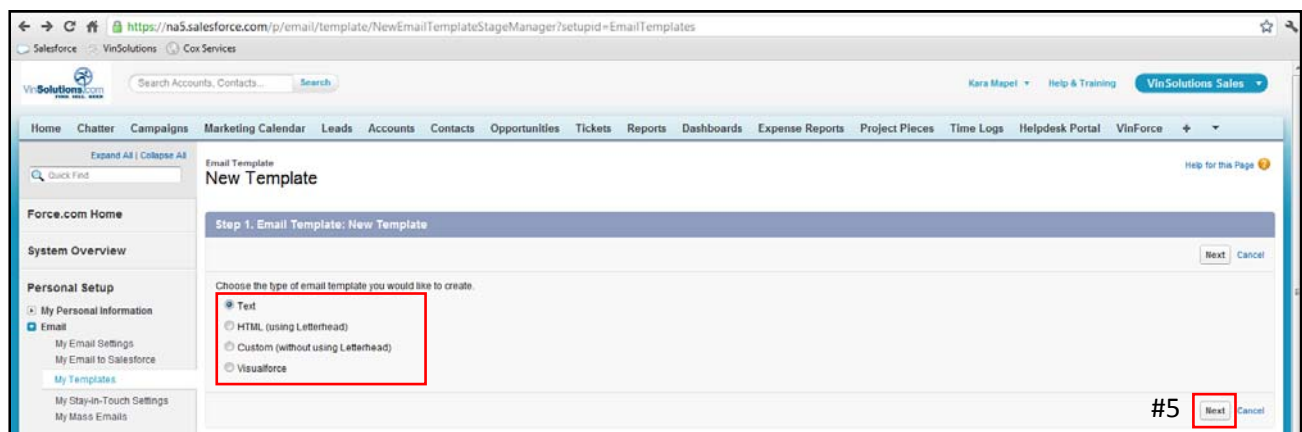
1. In Salesforce, click on your name and **Setup** to create your template.
2. Under Personal Setup, Click **Email**.



3. Under Email, click My Template
4. Then, click New Template.



5. Select the kind of template needed (Text, HTML, Custom or Visualforce) and then click, Next.



6. Select the folder you want your template saved in, Name your template, Subject and add email body text. Click Save

**\*\* Click the Box AVAILABLE FOR USE or you will not be able to find your template when emailing.**

Text Email Template  
New Template

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 contain data for that field. Enter substitute text after a comma in the merge field, for example, {Contact.FirstName.Sir or Madam}. When you save the template, the merge field will appear in the email body of the template with the following syntax: {NullValue(Contact.FirstName.Sir or Madam)}. Click on the link below to see a sample email template.

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

Previous Save Cancel

Required Information

Email Template Information

Folder Database Marketing

Available For Use

Email Template Name

Template Unique Name

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

Description

Subject

Email Body

#6

Now that the template has been created and saved. Please see following steps on how to create your email distribution list.

1. Click on the Contacts tab.
2. At the bottom of the page click on Mass Email Contacts.

Search Accounts, Contacts... Search

Kara Mepel Help & Training VinSolutions Sales

Home Chatter Campaigns Marketing Calendar Leads Accounts **Contacts** Opportunities Tickets Reports Dashboards Expense Reports Project Pieces Time Logs Helpdesk Portal VinForce

Contacts Home

View: All Contacts w/Email Got Clone Create New View

Recent Contacts

Name	Account Name	Phone
Rosenberger, Rebecca	Diamond Valley Honda	(951) 765-2700
Horn, Randall	Test Dealer	(800) 101-0101
Price, Eric	Blue Springs Ford	(816) 224-7342
Hoover, Corey	Midway Motors McPherson	(820) 241-1042

Reports

- HTML Email Status Report
- Partner Accounts
- Mailing List
- Account Teams
- Contact History Report
- Bounced Contacts
- Go to Reports

Tools

- Import My Accounts & Contacts
- Sync to Outlook
- Mass Email Contacts**
- Mass Stay-in-Touch
- Mass Add Contacts to Campaign

#1

#2

### 3. Click, Create New View.

Mass Email  
Recipient Selection

Step 1 of 4: Specify the recipients to include

Select a view below that contains the recipients to be included in this email.

View: TEST Go! **Create New View**

### 4. Name the View

### 5. Upload a Campaign if that is the email distribution you are looking for, or add fields and filters to create the email list. Click Save.

\*\*Note lists have to be less than 250 contacts.

Contacts  
Create New View

Save Cancel

Step 1. Enter View Name

#4 View Name:   
View Unique Name:

Step 2. Specify Filter Criteria

Filter By Owner:  
☒ All Contacts  
☐ My Contacts

Filter By Additional Fields (Optional):

Field	Operator	Value	AND/OR
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

Add Filter Logic...

Step 3. Select Fields to Display

Available Fields:   
Selected Fields:

#5 Filter By Campaign (Optional):  
Campaign Name:

Lookup

Search Within: All Active Campaigns Search  Go!

You can use "\*" as a wildcard next to other characters to improve your search results.

Recently Viewed Campaigns

The search returned more than the maximum number of rows (100). Please refine your search criteria.

Campaign Name
2011 Inventory Upsell
2011 New Dealer List
2012 Database Marketing Campaign
28 Days of Savings
4th of July- Carrie Bernal
4th of July- Jennifer Bamhart
4th of July- Matt Griffin

6. Filter through list to deselect duplicates and click Next.

The screenshot shows the 'Mass Email Recipient Selection' screen in Salesforce. The page title is 'Mass Email Recipient Selection'. The breadcrumb trail is 'Home > Chatter > Campaigns > Marketing Calendar > Leads > Accounts > Contacts'. The 'Contacts' tab is selected. The page is divided into two main sections: 'Step 1. Specify the recipients to include' and 'Step 2. Select an email template'. The 'Step 1' section has a 'Next' button highlighted with a red box. Below the 'Next' button is a table of available contacts. The table has three columns: 'Contact Name', 'Contact Email', and 'Account: Account Name'. The table lists 78 contacts in total, with the first few rows visible.

Contact Name	Contact Email	Account: Account Name
Andersen, Brad	b Andersen@willitthonda.com	Willit Honda South
Arbom, Brent	brent.arbom@willitthonda.com	Willit Honda South
Arbom, Anthony	anthony.arbom@willitthonda.com	Willit Honda South
Arbom, Ben & Gwen	ben.gwen@willitthonda.com	Willit Honda South
Ava, Brooke	brooke.ava@willitthonda.com	Willit Honda South
Bishop, Alan	alan.bishop@willitthonda.com	Willit Honda South

7. Select the Template that was previously created. Click Next.

The screenshot shows the 'Mass Email Template Selection' screen in Salesforce. The page title is 'Mass Email Template Selection'. The breadcrumb trail is 'Home > Chatter > Campaigns > Marketing Calendar > Leads > Accounts > Contacts'. The 'Contacts' tab is selected. The page is divided into two main sections: 'Step 1. Specify the recipients to include' and 'Step 2. Select an email template'. The 'Step 2' section has a 'Next' button highlighted with a red box. Below the 'Next' button is a table of available templates. The table has four columns: 'Folder', 'Name', 'Type', and 'Description'. The table lists 10 templates in total, with the first few rows visible.

Folder	Name	Type	Description
Sales Support	DCM Alert of Webex Complete	Text	
	Deal Closed Lost	Text	a deal has been marked Closed Lost
	File Closed-Account Active	Text	File has been marked Closed-Account Active
	CM explanation	Text	
	Here is your Proposal	HTML	Email Template used to send with Proposal
	Honda Certification	HTML	
	Infiniti Certification	Custom	

8. Add a Mass Email Name, Click Send.

\*\*Note there is a limit of 1000 emails that can be sent per day. If the limit is maxed out for that day, click schedule for delivery.

The screenshot shows the 'Mass Email Confirmation' screen in Salesforce. The page title is 'Mass Email Confirmation'. The breadcrumb trail is 'Home > Chatter > Campaigns > Marketing Calendar > Leads > Accounts > Contacts'. The 'Contacts' tab is selected. The page is divided into two main sections: 'Step 1. Specify the recipients to include' and 'Step 2. Select an email template'. The 'Step 2' section has a 'Next' button highlighted with a red box. Below the 'Next' button is a table of available templates. The table has four columns: 'Folder', 'Name', 'Type', and 'Description'. The table lists 10 templates in total, with the first few rows visible.

Folder	Name	Type	Description
Sales Support	DCM Alert of Webex Complete	Text	
	Deal Closed Lost	Text	a deal has been marked Closed Lost
	File Closed-Account Active	Text	File has been marked Closed-Account Active
	CM explanation	Text	
	Here is your Proposal	HTML	Email Template used to send with Proposal
	Honda Certification	HTML	
	Infiniti Certification	Custom	