



360 MASS Mailer

User Guide



360
Mass Mailer

360 DEGREE CLOUD TECHNOLOGIES PVT. LTD.

Contents

Use Case:	3
Application Details:	3
Email Connect Setup	3
ORG CONFIG	4
SENDGRID SETUP	5
Sending Emails to Standard and Custom Object Records	6
ListView ALL:	7
Sending Emails to Records Associated with a Particular Campaign	9
Email From Report	9
Sending Scheduled Emails	10
Drip Email Campaign	12
Email History	13
Sending Emails Using Automation	14

Use Case:

360 Mass Mailer is an application built extensively on the Salesforce platform hence the app is native to the Salesforce architecture. The application is used to customize the body, the sender, and receptor details and to schedule the emails for multiple records simultaneously. The app is extensively useful for the marketing email campaigns of any organization.

Application Details:

360 Mass Mailer application contains the following functionalities:

- Email Connect Setup.
- Sending Emails to Standard Object Records.
- Sending Emails to Records Associated with a Particular Campaign.
- Sending Emails via Reports.
- Sending Scheduled Emails.
- Email History.
- Sending Emails Using Automation.

Email Connect Setup

After landing on the 360 Mass Mailer application from the app launcher, you will see a tab for Email Connect Setup. The screen will show you options- “ORG CONFIG”, “OBJECT SETUP”, “SENDGRID SETUP” and “GENERAL SETTINGS”. To configure the 360 Mass Mailer app please contact the [360 Support Team](#).

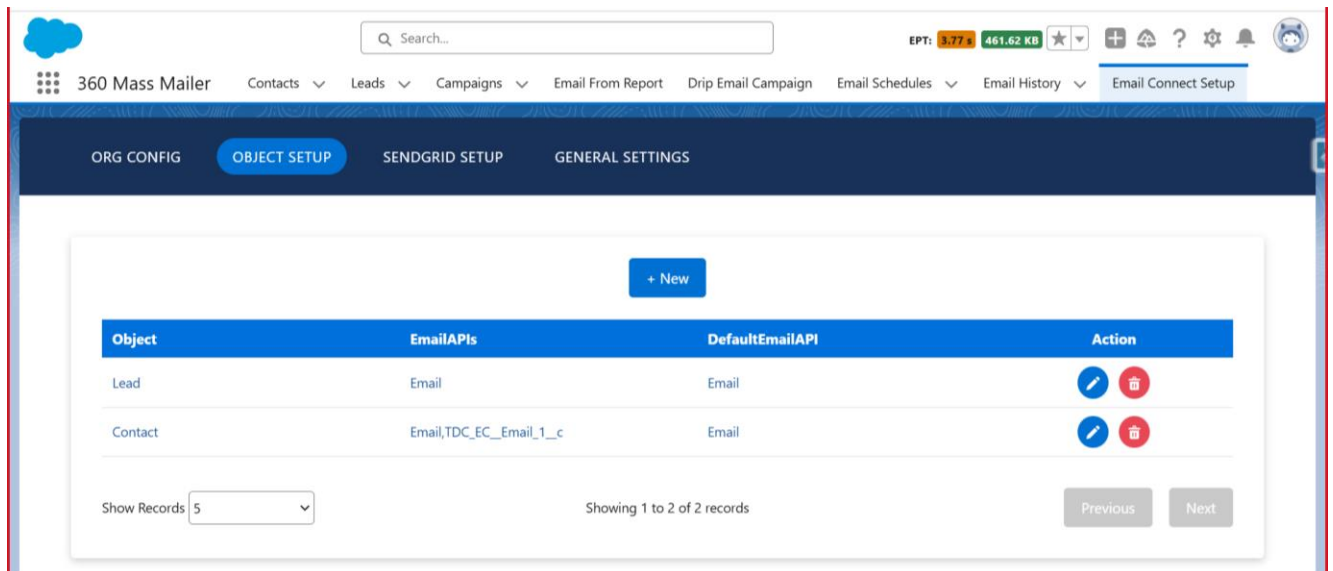


Fig 1: Org Config tab

ORG CONFIG

It will display the status, expiry date, and trial information for your SendGrid account subscription (if your account is in trial mode). If your account is active, it will only show the status and license expiry date.

Note- Clicking the 'Setup' button will sync data from your organization to the setup organization.

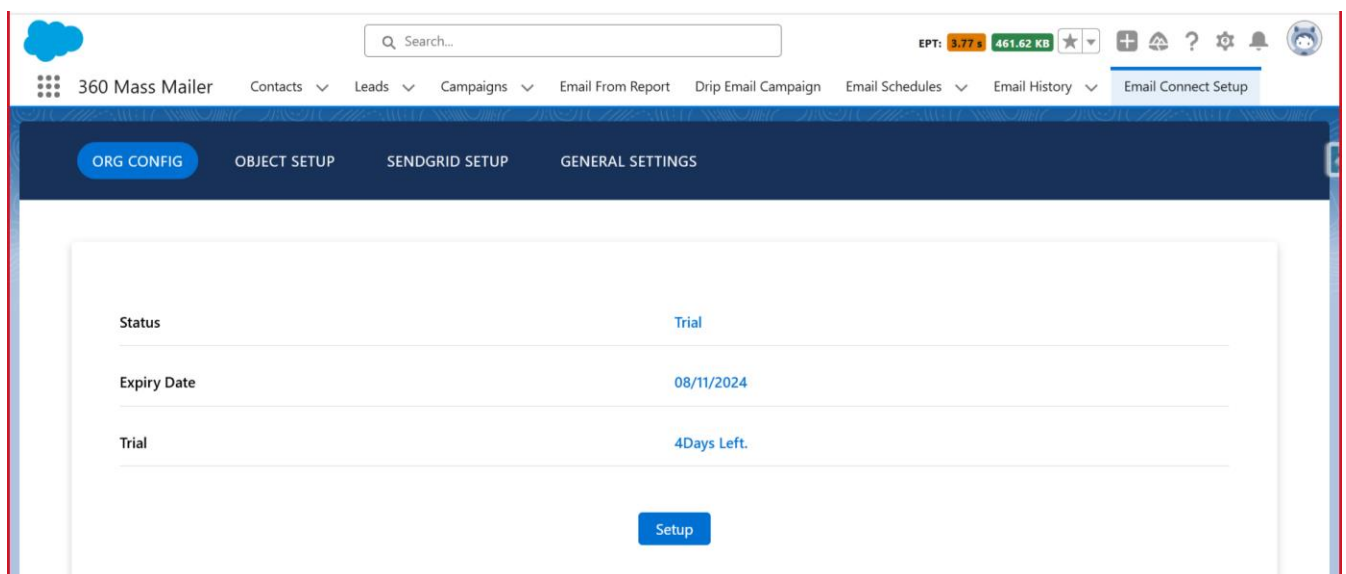


Fig 1: Org Config

PROVIDER SETUP

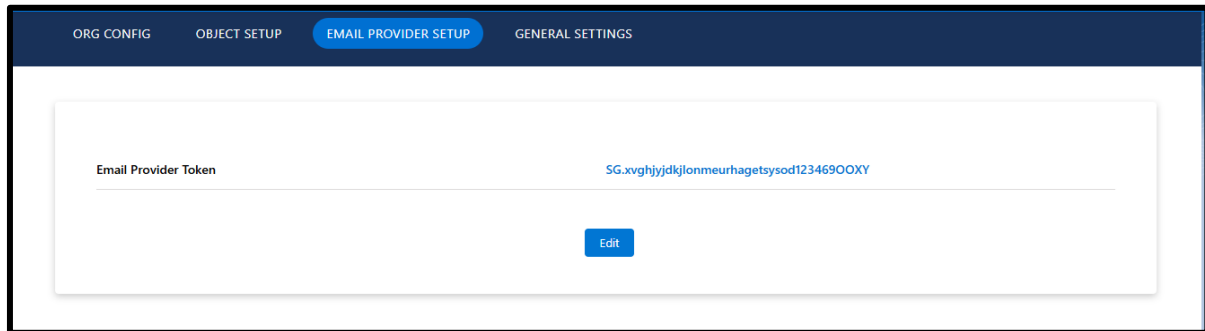


Fig 2: Provider Setup

This will show the setup done on the SendGrid end. The access token that is generated from the SendGrid dashboard will be entered here which will link your org to the SendGrid account.

GENERAL SETTINGS

Under this subtab there are two options:

Log Email under "Activity" Tab: When this option is selected, emails from the app will be logged under the 'Activity' tab of the respective record (such as a Contact record).

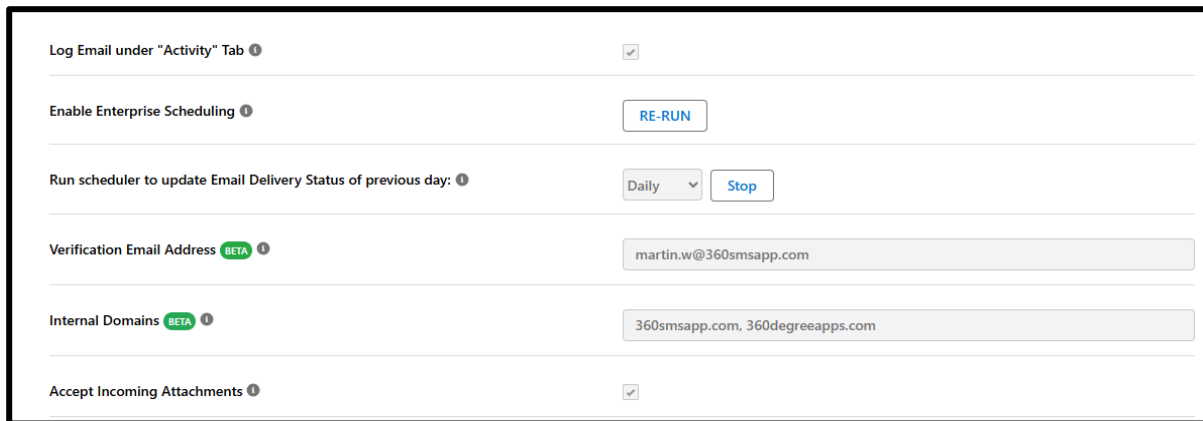
Enable Enterprise Scheduling: Use this feature when multiple users are scheduling Emails.

Run Scheduler to update Email Delivery Status of Previous Day: Use this feature to recheck the statuses of email delivered in the last 24 hrs.

Verification Email Address: The address used for email verification.

Internal Domains: Use this feature to avoid syncing the communication between two employees of the same organization into Salesforce.

Accept Incoming Attachments: Use this feature to enable showing the attachments in the incoming emails.



Log Email under "Activity" Tab ☒

Enable Enterprise Scheduling

Run scheduler to update Email Delivery Status of previous day: Daily

Verification Email Address BETA

Internal Domains BETA

Accept Incoming Attachments ☒

Fig: General Setting subtab in Email Connect setup

Sending Emails to Standard and Custom Object Records

In this feature, we support standard and custom objects

For example- We take the example of the common objects-

Go to either of the Contact or Lead tabs >> From the list view, select any random record >> Click on the "Send Bulk Email" button.

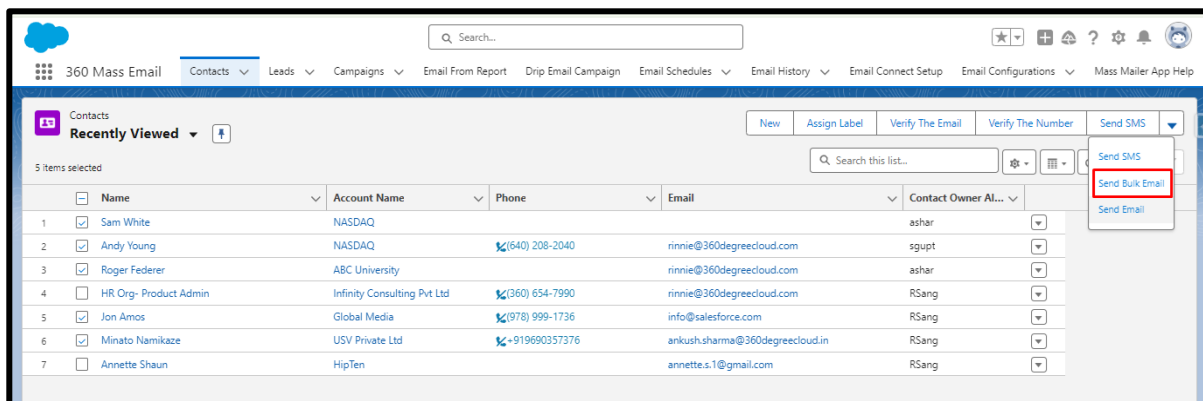


Fig: Send Bulk Email Button

You'll be redirected to a component to compose your email with details.

List View ALL:

You can now send an email by selecting the radio button located at the top-right corner of the Email Compose page, labeled 'Send Email to all Contacts.' This option allows you to email all records in the chosen list view, regardless of whether they are individually selected

Note: This functionality is not enabled by default, to enable this please contact to [360 Support team](#)

Copyright © 2023 360 Degree Cloud – All Rights Reserved.

This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Fig : Compose Email Component

Fig : Compose Email Component.

On the Compose Email component, you will see the following details:

- **From Email Type:** The sender's email address. It has three options viz. The Current User Email is the email ID of the logged-in user, the Record Owner Email is the email ID of the record owner to which the mail is to be sent and the third option is to enter a custom email ID. Note that, for successful delivery, the email domain needs to support emails from outside the organization and the domain should be verified on SendGrid. The field From Email will be auto-populated based on your selection of this field.

Copyright © 2023 360 Degree Cloud – All Rights Reserved.

This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- To Email: This is the receptor email address. This is a dropdown field whose values are taken from the email fields created on the corresponding object. You can select multiple values here.
- CC, BCC, and Reply-To checkboxes: You can enable the CC, BCC, and Reply-To checkboxes as needed. When you initiate a bulk email, it will also be shared with the email addresses specified in the CC, BCC, and Reply-To fields on the compose mail page. You can add up to 5 emails in the 'CC' and 'BCC' fields, and 1 email in the 'Reply-To' field.
- Drip Email Campaign: You can select and execute a drip campaign using this option.
- Selected records will show the number of records selected. The limit here is 200 records simultaneously which is the standard Salesforce limit.
- Here you can either send custom emails using the pre-created Salesforce templates, templates from SendGrid or you can also customise your email.
- You can also upload/drag-drop the files. You can select only one file at a time and the max size of the file is 5 megabytes.
- Then you can click on the Send button to send the message.
- A success screen will appear.

Sending Emails to Records Associated with a Particular Campaign

For sending mass emails using campaigns:

Go to Campaigns tab >> Click on desired Campaign record >> Go to record detail page >> Click on the Send Email button.

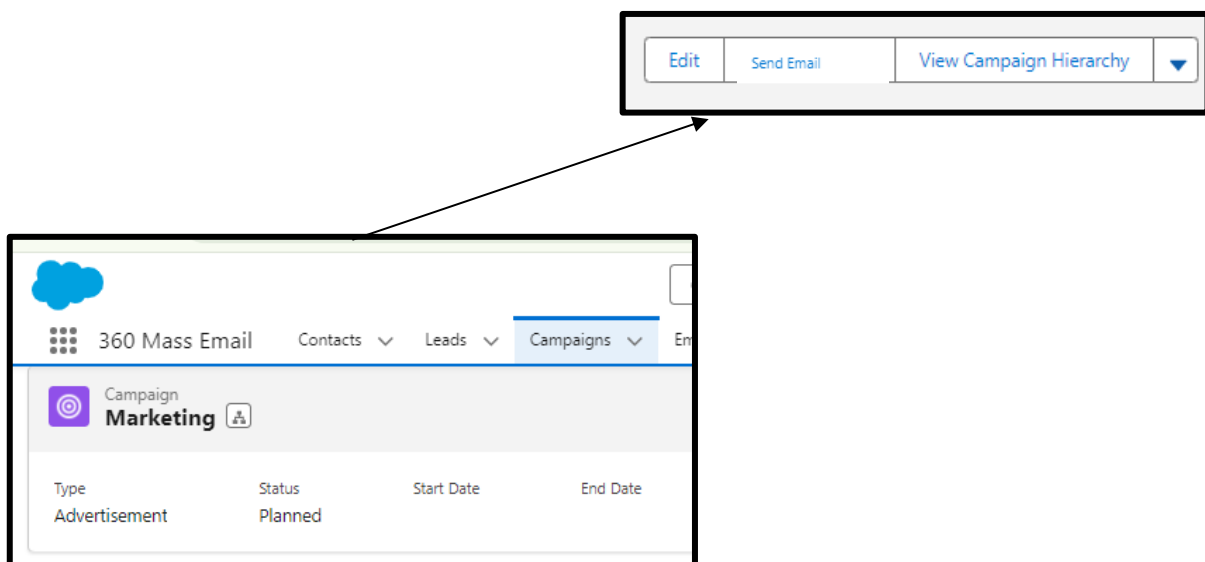


Fig : Sending Email Through Campaigns.

Copyright © 2023 360 Degree Cloud – All Rights Reserved.

This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

It will redirect you to the same Compose Email component.

Email From Report

This functionality allows us to send emails to multiple records simultaneously depending on the reports created.

Go to the Email From Reports tab >> Select a random report >> Select a record id column >> Click on the send button.

There is the hyperlink for the Mass Mailer App user guide through the note section under Email from Report

The screenshot shows the '360 Mass Email' interface with the 'Email From Report' tab selected. The table lists 10 reports, each with a radio button, a report name, a format, and a folder name. A note section at the bottom provides instructions for sending emails from reports.

	Report Name	Report Format	Folder Name
1	☐ Active Agents Per Calling List	Summary	360 CTI App Report
2	☐ Total Outgoing Calls VS Answered	Summary	360 CTI App Report
3	☐ Outgoing Calls Missed By Agent	Summary	360 CTI App Report
4	☐ Active Voice Broadcast Details	Tabular	360 CTI App Report
5	☐ Total Incoming Calls VS Answered	Summary	360 CTI App Report
6	☐ Active Calling List Details	Summary	360 CTI App Report
7	☐ Outbound Calls By Date	Summary	360 CTI App Report
8	☐ Inbound Calls By Date	Summary	360 CTI App Report
9	☐ Voicemail Drops	Summary	360 CTI App Report
10	☐ Top Incoming Day of the Week	Summary	360 CTI App Report

Page Size: 10 Showing 1 of 13 Page(s) << First < Previous

NOTE :

1. In Report, for sending Emails "Record Id" column is mandatory.
2. By default from Reports, you can send Emails up to 2k records at once.
3. You can send Emails more than 2k records only from Tabular reports by using certain filter criteria as mentioned in [Mass Mailer App Guide](#).

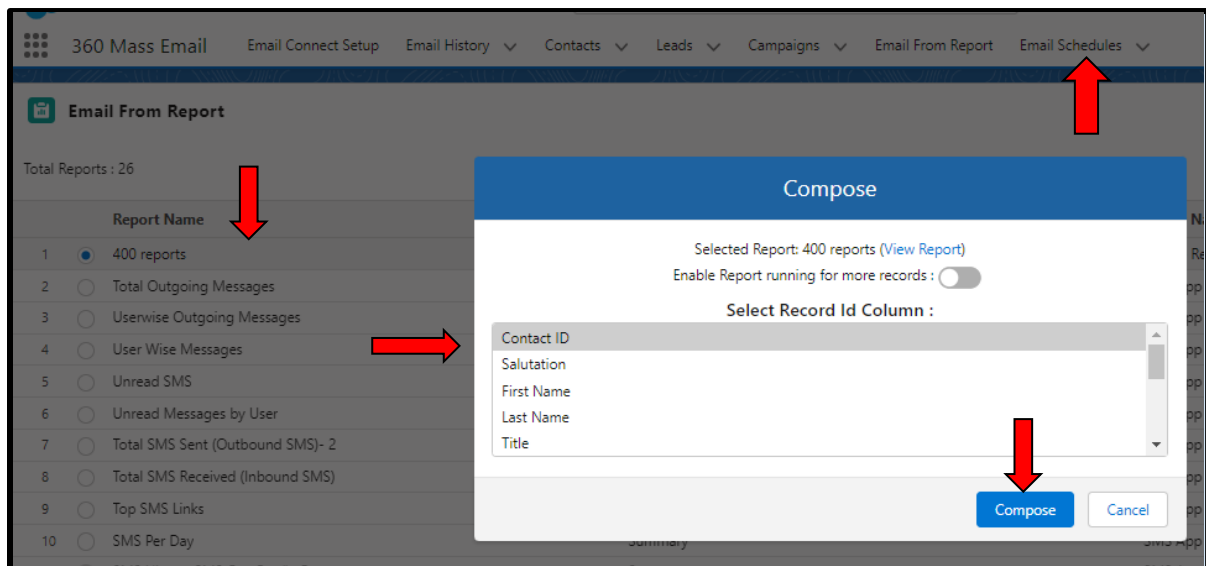


Fig : Sending Emails Through Reports.

Note: It is mandatory that the report has a column for the record id in order to have the feature enabled.

Sending Scheduled Emails

On the Compose Email component which is used to send the emails, there is an option to schedule the email. You can choose to schedule the email daily, weekly or monthly. You can also set up the time you want to send the emails.

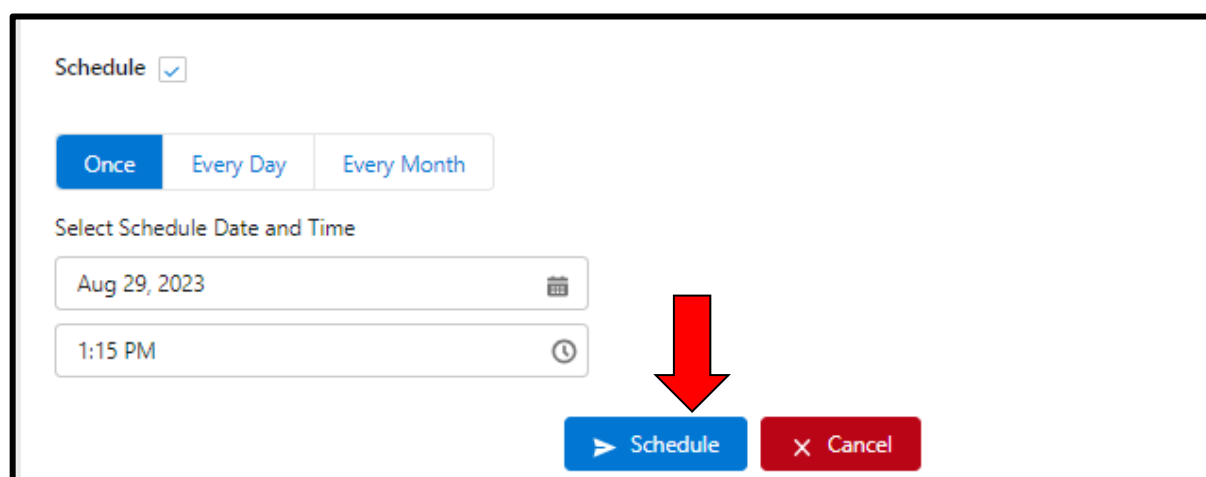


Fig : Sending Scheduled Emails.

In order to access the scheduled email records,

Click on the Email Schedules tab >> Click on the record.

This will open up the record detail page.

The screenshot shows the 'Email Schedule' interface with a 'List View' header. Below the header, there are two tabs: 'Related' and 'Details', with 'Details' being the active tab. The 'Details' tab displays a form with various fields for scheduling an email. The fields are organized into two columns. The left column includes 'Contact', 'Source' (set to 'List View'), 'From Email' (set to 'ruchika.gupta@360degreecloud.in'), 'IsSent' (checked), 'Subject' (set to 'Elevate Your Experience with Our New Product - Exclusive Customer Demo Invitation'), 'To Email Api' (set to 'Email'), and 'Template Id'. The right column includes 'Owner' (set to 'Ruchika Gupta Old'), 'Lead', 'Message Type' (set to 'text/html'), 'Object Name' (set to 'Contact'), 'Schedule Time' (set to '8/28/2023, 2:30 PM'), 'End Date', and 'Message' (set to 'Dear Arthur,'). Below the 'Message' field, there is a preview of the email body text: 'We hope this email finds you well. We are excited to introduce you to our latest innovation that is set to transform the way you [describe the value proposition of your product]. As one of our'.

Email Schedule	
List View	
Related	Details
Contact	Owner
Source	Lead
From Email	Message Type
IsSent	Object Name
Subject	Schedule Time
To Email Api	End Date
Email	Message
Template Id	

Fig : Email Schedule.

The record detail page has the following information:

- Source: It gives information on whether the email was sent from the list view or or from the record detail page.
- From Email: The sender's email id.
- Subject: Subject of the sent email.
- Object Name: The object on which the email was scheduled.
- To Email API: Email field from the object that contains the receptor email ID.
- Message: Message body.

There is a checkbox named 'Run report at scheduled time to fetch new records.' Enabling this checkbox will ensure that new records are fetched at the scheduled time

Note- this checkbox is enabled by default, though you can enable/disable this checkbox as per your need

Schedule ☒

Once

Daily

Monthly

Select Schedule Date and Time

Start Date (DD-MM-YYYY)

Start Time

☒ Run report on scheduled time to fetch new records

> Schedule

✕ Cancel

Drip Email Campaign

From this tab, you can create a Drip Email Campaign and customize actions as needed. Once the drip is created, it can be used to execute bulk emails for follow-ups, promotions, and other purposes.

S.No	Action	Name	Description	Status	Object Name
1		Mass Mailer Drip		Active	Contact

Fig: Drip Email Campaign

Email History

In order to access the details of the sent emails,

Go to the Email History tab >> Open the email history record

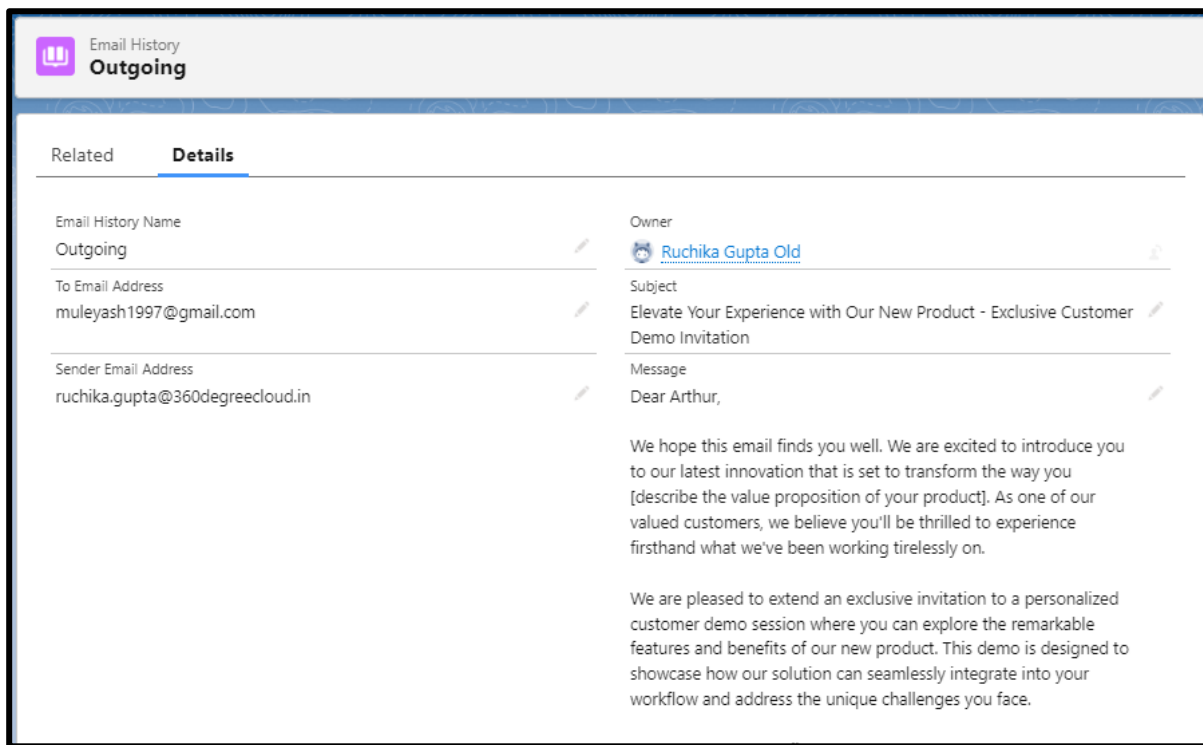


Fig : Email History.

It will open up the record detail page. On the record detail page, you can see the following information:

- Email History Name: Shows whether the email was outgoing or incoming.
- In the Attachments section, the attachment details will be visible.
- The Statistics section will show the details of email performance.
- The delivery checkbox will show whether the email was delivered or not, the Status field will show the delivery status.
- If there is any link present in the email, the Email Click Count field will show the number of times the link was clicked.
- The spam checkbox will show whether the sent email is getting into the spam box of the user or not.
- Every sent email will provide the end user with the option to unsubscribe or resubscribe. Whenever the user clicks on these options, it will reflect on the corresponding checkboxes on this page.

Sending Emails Using Automation

In this feature, we can set up the mass mailer feature using custom automation depending on the particular criteria. Follow the following steps to have this feature enabled:

From the setup page, enter Flows in the quick find box >> Go to the Flows >> Click on new >> Select the type of Flow you want to create >> Select the object on which you want to create the Flow >> Select the criteria which you want to pre-define to send the emails >> Click on decision element >> Select Action element >> Select Send Email From Process Builder as the apex method >> Set up the variables as shown in the following figure >> Activate the Flow.

Run Debug View Tests Save As New Version Save Activate

← Send Email from Process Builder X

* Label
Send Email

* API Name ⓘ
Send_Email

Description

Use values from earlier in the flow to set the inputs for the "Send Email from Process Builder" Apex action. To use its outputs later in the flow, store them in variables.

Set Input Values

Fig : Mass Email Using Automations

In order to set up scheduled emails using automation, follow the same procedure and set up the object variables as shown in the following figures.

Set Input Values

A_a * Record Id ⓘ

A_a Triggering Lead > Lead ID ×

A_a * Template Detail ⓘ

> Send Email ×

A_a * To Email ⓘ

A_a Triggering Lead > Email ×

Fig : Mass Email Using Flows