



360 Mass Email

Mass Email: Guide



360 DEGREE CLOUD TECHNOLOGIES PVT. LTD.

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Introduction

"Mass Email" refers to the capability of sending a large number of emails to a targeted audience simultaneously. Mass email is not limited to just text messaging but encompasses a broader communication platform that includes email functionality.

Features

- The Mass Email feature allows users to create and send emails in bulk to a list of contacts or subscribers.
- The Mass Email feature is often integrated into the overall communication and marketing strategy of businesses, enabling them to maintain consistent and effective outreach efforts through email channels.
- Mass Email functionality typically includes options for creating and customizing email content, selecting recipient lists or segments, and scheduling or sending the emails in bulk.

Use Cases

- The Mass Email feature enables users to create engaging newsletters, delivering compelling content that resonates with their audience.
- The app's user-friendly interface streamlines the process, allowing users to customize and schedule mass emails, ensuring timely and impactful communication.

Email Connect Setup

In this tab, we have the following options:

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- ❖ Email Connect Configuration
- ❖ SendGrid Setup

Email Connect Configuration

In this tab, we show the following information:

- **Status:** It shows the status of the App Subscription.
- **Expiry Date:** It shows the date when the license is going to expire.
- **Trial:** It shows the days left for the trial version to cease.

SendGrid Setup

In this tab, we show the access token which is generated from the Customer's SendGrid account. We have provided an option to edit the access token if there is any change in the SendGrid account from the customer's end. This access token keeps the SendGrid account linked to Salesforce.

To link SendGrid with the Mass Email app, follow the following steps

Open the concerned SendGrid account >> Go to the Home Page >> Go to the Settings dropdown on the left down >> Click on API Keys >> Click on Create API Key >> Fill out the necessary details >> Copy the created API Key >> Go to the SendGrid Setup tab on the Salesforce org >> Click edit, paste the key and save.

Sending Mass Email

We have provided two ways of sending out mass emails.

- From the Object list view.
- From the Email From Reports component.

First, we have to configure the object to enable it to send out the Mass Emails

Email Configuration Tab

In order to enable any object to send out emails, that object needs to be configured. For that, we have to manually create a tab for email configuration.

To create a custom tab for email configuration, follow the following steps

From the Salesforce Setup page, enter tabs in quickfind box >> Click on tabs then click on New >> Search the object name EmailConfig >> Choose suitable tab style >> Click on next, and then save.

To configure object for sending out emails, follow the following steps

From the App Launcher waffle, search EmailConfig and click on it >> Click on New >> Enter object details for which you want to configure the object >> Click save.

EmailConfig tab has the following details:

- Object API Name shows the API name of the object configured.
- Object Label shows the label name of the object.
- Name API shows the field used for storing the record names in the object.
- Default Email API shows the default field used for sending out emails.
- Email APIs shows additional fields available for sending out emails.

From the Object List View

Sending mass emails is supported by all the custom and standard objects. To send mass emails from the object list view, you will need to first have the Send Mass Email button enabled. For this, you need to follow the following steps

To enable the “Send Mass Email” button, follow the following steps

Open the concerned object's list view >> Go to the setup icon (gear icon) >> Click on Edit Object >> Go to the “Lightning Button Layout” >> Edit the desired layout >> Go to the custom buttons >> Select the “Send Mass Email” button from the right side and add it to the left side >> Click on Save.

To send out the Mass Emails from the list view, follow the following steps

Open the concerned object's list view >> Select the records you want to send the emails to >> Click on the “Send Mass Email” button that you enabled >> Fill in the concerned details on the Send Email Component >> Send

From Campaigns Object

360 Mass Email Application allows you to send out emails to your campaigns.

To send out the Mass Emails from the Campaigns object, follow the following steps

Open the Campaigns object >> Select the Campaign record you want to send the emails to >> Click on the gear icon >> Click on edit object >> Go to page layouts and edit the concerned layout >> From the buttons in the top section, drag down the Send Mass Email button >> Click Save >> Go back to the Campaign >> Ensure that the campaign isn't empty >> Click on the dropdown to the top right >> Click on the Send Mass email button >> Choose the campaign member status >> Fill out the necessary details >> Click on Send.

From Reports

We can also send out mass emails using the created reports in Salesforce. Only thing required here is that the created report should have a column for record Id.

To send out the Mass Emails from the Salesforce Reports, follow the following steps

Open the "Email from Reports" tab >> Open the concerned report >> Select the appropriate record Id column >> Click on Compose >> Fill in the required details in the Send Email Component.

Send Email Component

Create Message

☒ Send To (Leads: 2/296) ? ☐ Send messages to all 296 Leads ?

S No.	Name	Act...
1	Anastasia Steele	View ✕
2	Alina starcove	View ✕

To ? **From** ?

Channel ? **Feature** ?

Folder ? **SMS Template** ?

Fig1: Create Message Component

Message

You can enter up to 1000 characters

Add Files You can select only 5 file of size up to 5 MB ?

☐ **Schedule** ?

☐ **Relate Incoming to Record Owner** ?

Fig 2: Create Message Component

In this component, we provide the following options:

- **From Email Type-** It gives the sender's email type.
- **From Email** gives you the exact sender email used. This email needs to be verified from SendGrid.

- To Email gives you the receiver's email ID. It contains the email fields added in the Email APIs field in the email configuration tab.
- **Template** Type gives you the choice to select either the Salesforce templates or SendGrid templates. You can edit the merge fields used in Salesforce templates after the message is populated in the message box, but you cannot edit the merge fields used in SendGrid templates.
- **Email Subject** and **Message** give the email details.
- In the **Attach Files** section, you can either upload the files from your computer or select from the database.
- **Schedule** button can schedule the email based on your preference.
- **Send** and **Cancel** buttons help in sending and canceling the email, respectively.

Create Email Templates in SendGrid

360 Mass Email application allows users to use the SendGrid templates to be send them to the end customers.

To create the email templates in SendGrid, follow the following steps

Open the SendGrid account >> Click on Email API >> Go to Dynamic Templates >> Click on Create a Dynamic Template >> Enter the name >> Go to the created template >> Click on Add Version >> Select the design >> Enter the version name, subject, preheader and details >> Drag the necessary components from build tab >> Create the template and click on Save.

Frequently Asked Questions

Q. How to know the bounce emails list

Ans. The report can be created on salesforce to find out bounce emails.

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Q. How many are delivered and how to know the read receipt percentage?

Ans. You can track that in an email history object and create a Salesforce report.

Contact Us

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