



Next Steps: Sending Email Through Salesforce

Handouts available to download

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Introductions



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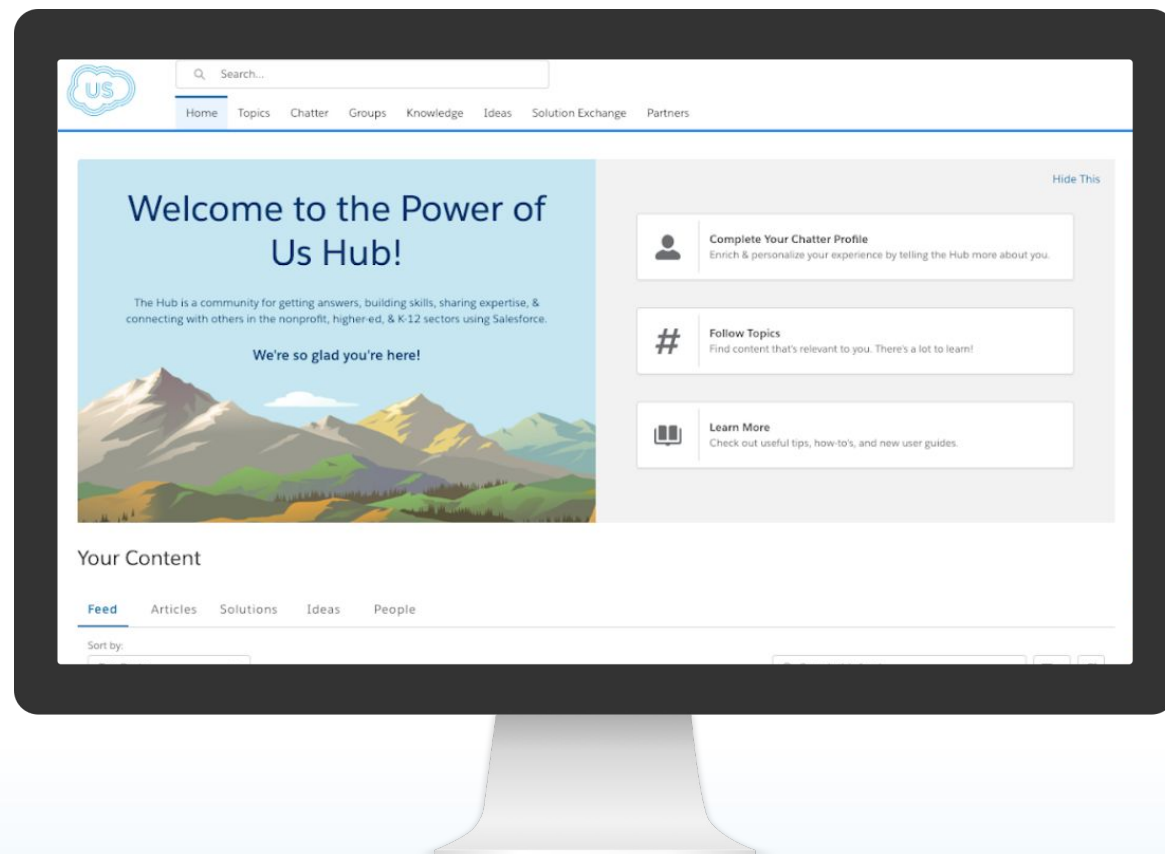
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Logistics

Questions, Answers, and Staying in Touch

- The recording and slides will be emailed and posted
- Ask questions using the Q&A widget
- Continue the discussion with the #Email topic in the Power of Us Hub
- Connect with user groups in your area
- Trailmix: <https://sfdc.co/EmailMix>














The Power of Us Hub



Engagement Goal: Track All Activities in Salesforce

Get Everyone on the Same Page



Past Activities		
>	 Thank you for your support You logged a call	Today ▼
>	 upcoming dog meet & gre... You sent a list email.	2:59 PM Jun 4 ▼
>	 Meeting You had an event	1:00 PM Apr 8 ▼
>	 winter gala  ✉ Unopened You sent an email to lucy@sadeghian.com	1:05 PM Dec 5, 2018 ▼
>	 2 - Volunteer Approval ...  Kristin Dorage had a task	Oct 19, 2018 ▼
>	 Sign Up Phone Call  You had a task	Oct 15, 2018 ▼
>	 Volunteer Approval Em...  Anne Crawford had a task	Oct 11, 2018 ▼



Agenda

Types of Email Sent by the Ugly Dog Adoption Agency

- Conversational emails
- Small group email
- Email related to Campaigns
- Mass email
- Email-to-Case
- Email Integrations



Conversational Email

ED invites major donor to attend gala

Open the Contact record, Activities section, Email tab

Helpful features:

- Include attachments
- Relate to other objects
- Record stored.

Speed it up next time

- Insert Quick Text
- Create a template from here



Set Up Email Tracking for Individual Email

Open, Unopened, Bounced

See status of opened, bounced, not opened in Activity timeline

SETUP: Enable Enhanced Email and Email Tracking

Allow folks to opt out of tracking for *all* emails

[More Info
on email
tracking](#)

Oh darn! My email
to corgilover2
bounced yesterday!



Email to a List of Contacts or Leads

New dog alert to trained foster parents

Send from a List View

Limit of
5,000
emails per
day

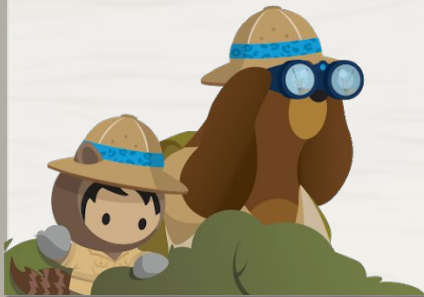
Log Activities

- This stores an activity
- List Email Logging must still be enabled (on by default)



Quick Poll

At max, how many
emails would you send
out in one day?



Consider the Intention of Your Email

Transactional



Dear Elizabeth,

Thank you for
your donation of
\$60 on 2/1/20.

Sincerely,
KCTS 9

Conversational

Dear Joshua,

Congrats on your promotion!
Let's have coffee soon.

Sincerely,

Michelle

salesforce

Commercial

Ter Save the Chimps en... Thu, May 23, 11:04 AM (22 hours ago) ☆ ↶ ⋮
to me ▾

The email content features the "Save the Chimps" logo at the top left, which includes a silhouette of a chimpanzee. Below the logo is a large photograph of a chimpanzee's face. A green diagonal banner in the top right corner of the image contains the text "MAKE THEIR WISH LIST DREAMS COME TRUE". The name "NIGIDA" is visible in the bottom right corner of the photo.

Other Tools

chimps their favorite
treats!

Comply with State and National Laws

CAN-SPAM (USA), CASL (Canada), GDPR (Europe)

Commercial email requires an unsubscribe link by
CAN-SPAM Law

Salesforce does not include an unsubscribe link

Salesforce is not a mass email tool

Send commercial email through a mass email tool

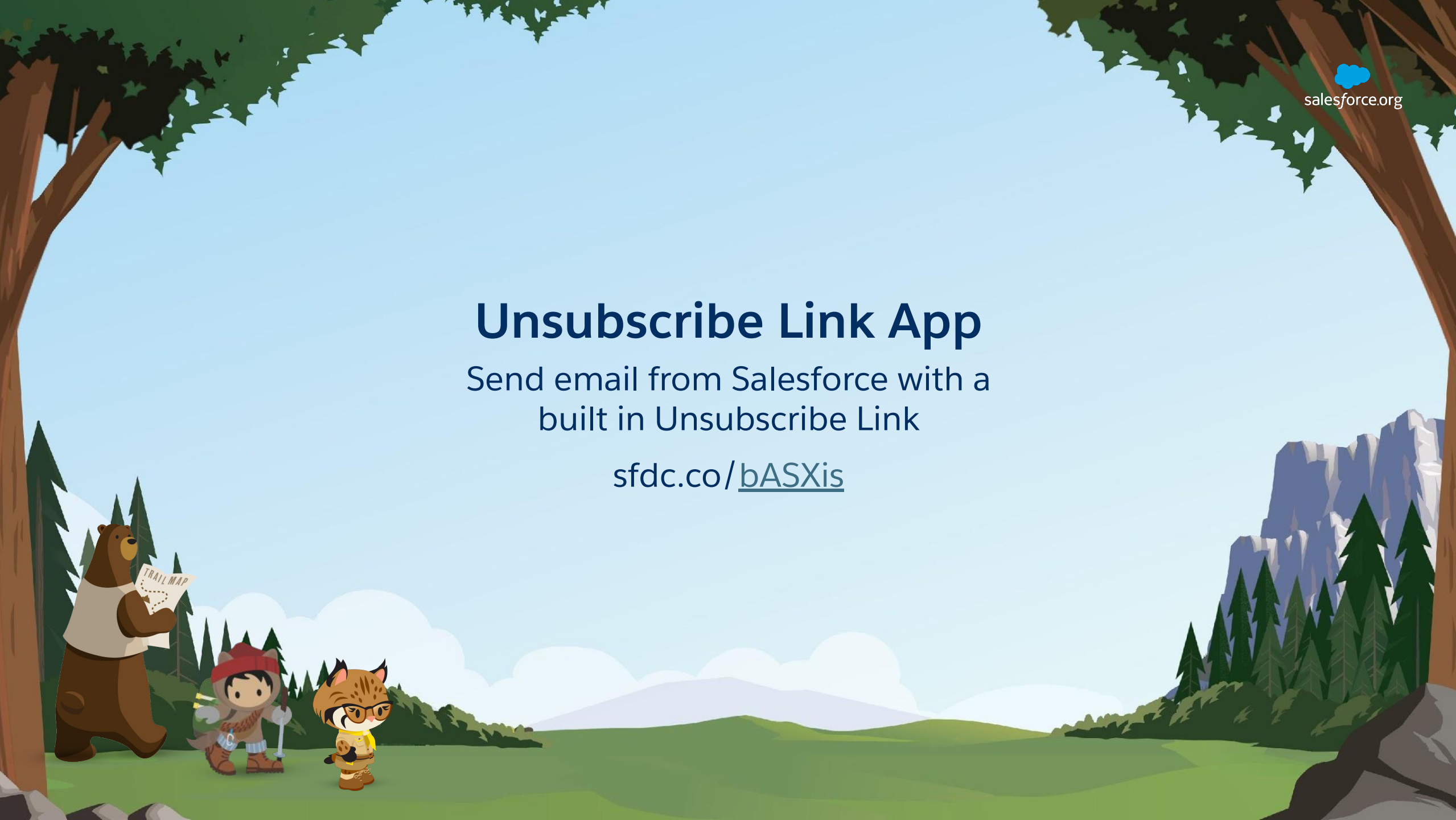
Consult a legal expert



Unsubscribe Link App

Send email from Salesforce with a
built in Unsubscribe Link

sfdc.co/bASXis



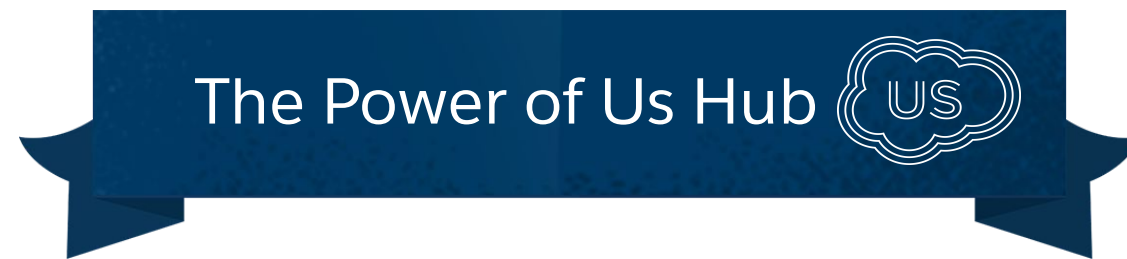
Choose a Mass Email Tool from the AppExchange



Get advice from our community



Find tools and read reviews.



Read nonprofit user reviews.



Email to Campaign Members

Invitation to attend a fostering orientation

Campaign
Webinar
2/13



A campaign is a group of people.

Same behavior as List Email:

- It stores activity on each recipient's record.



Organization-Wide Email Addresses

Send “from” a specific address

Send “from” an alias like support@uglydog.org

Send “from” another user like the Executive Director

Owner must verify address

Use with individual emailing

Not available for List Email



Reporting on Emails


Report Type: HTML Email Status Report

Limitations:

- Only the user who sent the HTML email can see results in report

- Not as robust as email marketing tools

- Works for list email and email from records



Learn more about
HTML Email Status
Report

Email-to-Case

Cases track anything through a process

✓ Additional Information

Status	Type
New	
Case Origin	Case Reason
Web	New problem
Priority	
Subject	
Requesting Help	
Description	
Help please	
Internal Comments	

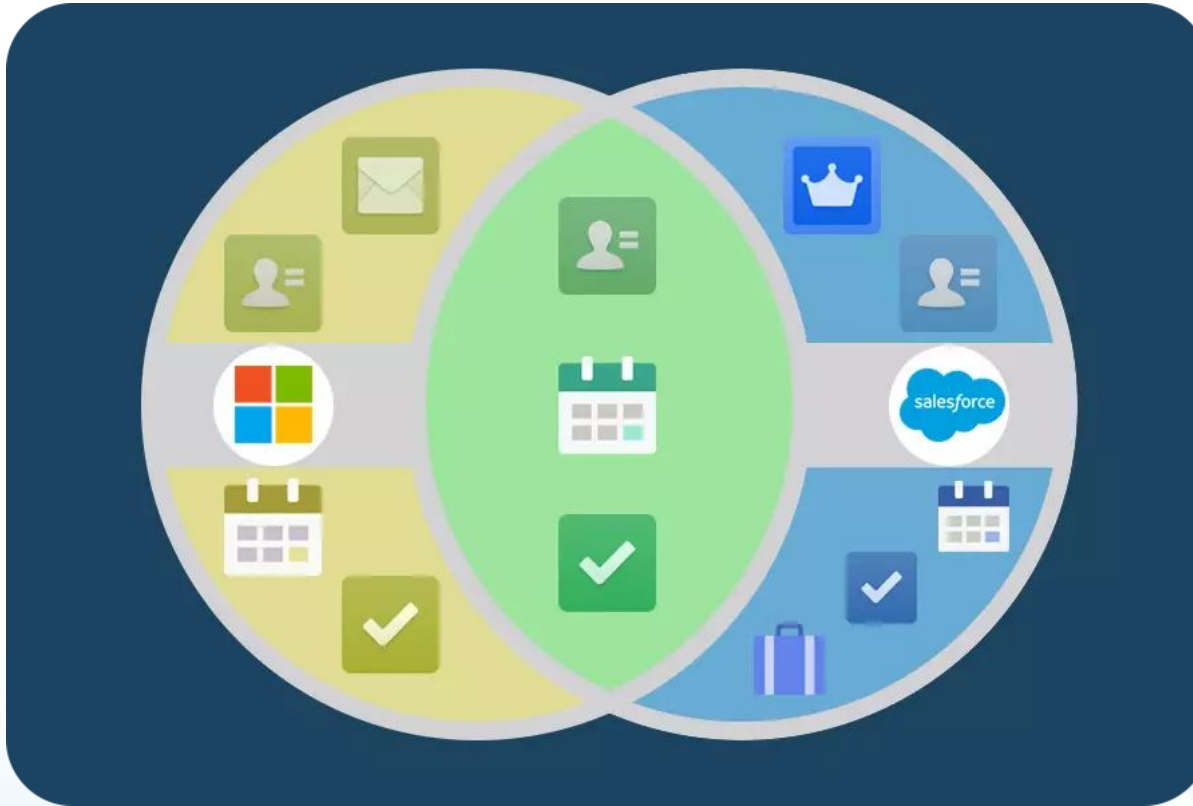


Ugly Dog Adoption
Agency uses cases for
dogs reported missing.

Get Started with
Program Management
<https://sfdc.co/GSPM>

Gmail, Outlook and Salesforce Inbox

Connect sent and received email to Salesforce records



Developers: Try Apex Email Service

Concluding thoughts

Best use cases: Personal/Conversational and Transactional (Receipts) Email

Limitations for Mass Email:

- CAN-SPAM compliance is not handled for you
- Tracking/reporting is limited
- AB testing is manual

Ask the “App Advice and Consumer Reports” group in the Hub

Connect Outlook and Gmail today



Keep Learning Today

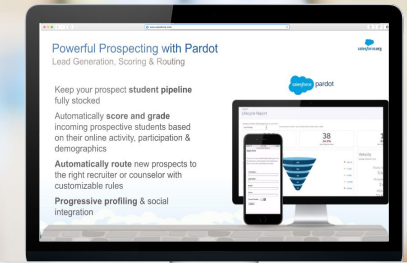


TRAILHEAD

Trailmix:
sfdc.co/EmailMix

power of
us hub

Go to the
Power of Us Hub



Watch Other
Webinars in the
Series



Next Steps: Build on the Fundamentals for Nonprofits

A 4-part webinar series

Next session

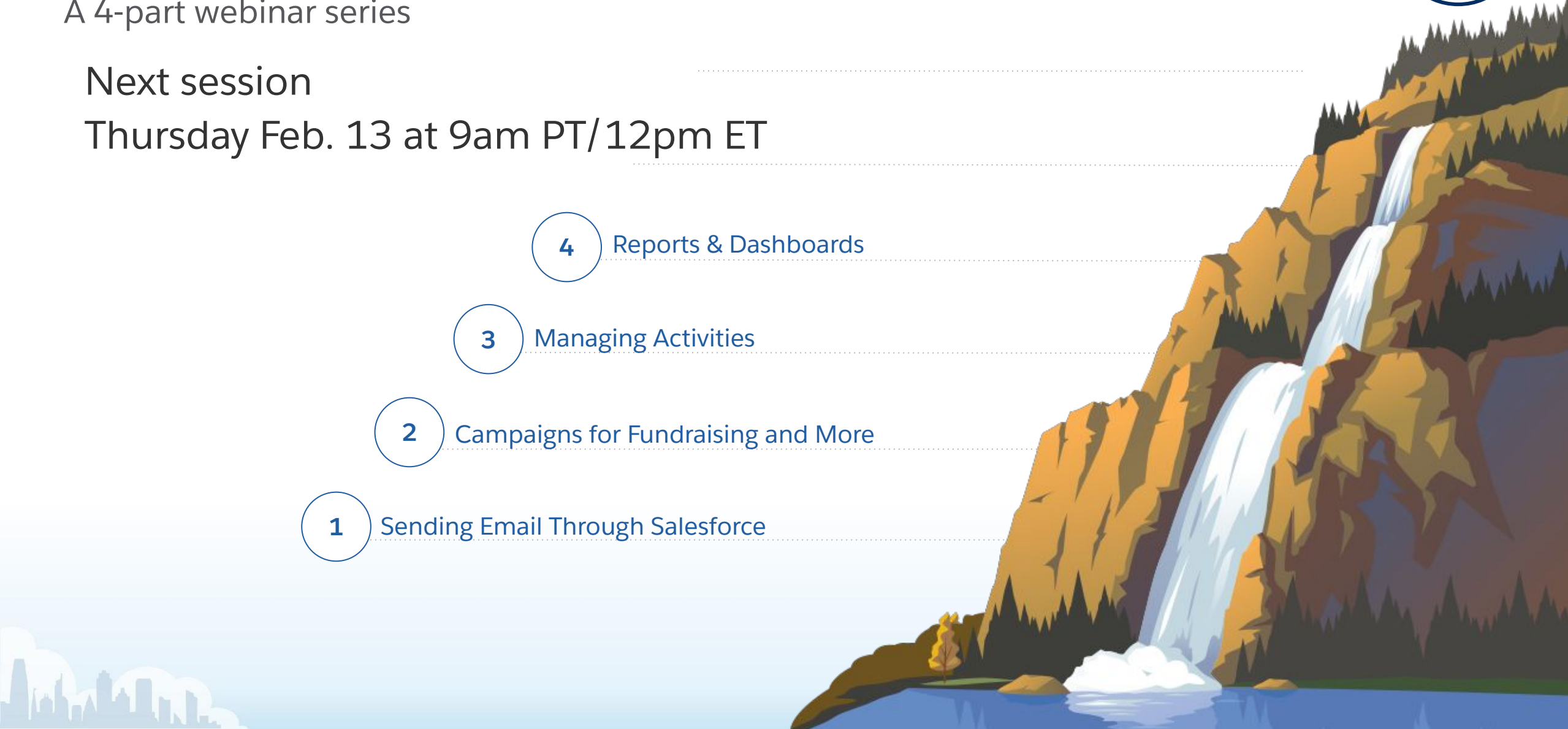
Thursday Feb. 13 at 9am PT/12pm ET

4 Reports & Dashboards

3 Managing Activities

2 Campaigns for Fundraising and More

1 Sending Email Through Salesforce



We Welcome People with Disabilities

For questions about accessibility or to request an accommodation, please contact Jessie Rymph at jrymph@salesforce.com.

Requests should be made at least 72 prior to the event: Monday (2/10 9am PT) for Campaigns on 2/13.

thank you

