

# How to Send Mass Emails From Case

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# Overview

Salesforce offers a "SendListEmails" button for sending emails to multiple Leads, Contacts and Campaign Members. However, this feature isn't available from the Case list view.

Our volunteers have solved this challenge using Apex and Visualforce pages with custom labels.

In order to build this in your own Salesforce Instance you must first build and test the code in a sandbox environment, then promote the change into the production environment.

To perform this activity system administrator access is required as a prerequisite.

# 1. Process to set up

#### 1.1. Set up of Email Template Folder

- 1. Go to Setup→Email→ Classic Email Templates
- 2. Click Create New Folder Link. (Or choose your desired Folder)

	Setup Hon	ne Object N	Nanager 🗸		Cr	eate	
Q cla				τυρ lassic Email Templ		older	
	<mark>Iassic</mark> Email Templat <mark>Iassic</mark> Letterheads	es	MassE	mail			
Didn't f	ind what you're look	ing for?	Clas	ssic Email Template Availa	ability		
	Global Search Setup->		Folder 🛛	/lassEmail	Edit Create New Folder	A   B   C   D   E   F   G	H   I   J   K   L   M   N
	QuickFind-> Type				New Template		
	Classic		Action Edit   Del	Email Template Name ↑ MassEmailFromCase	Template Type Text	Available For Use	Description

#### 3. Enter Folder Label

- a. Folder Unique Name auto populates
- b. Make sure Folder Access is "Read/Write"
- 4. Click Save.

Classic Email Templates	
	Give
Email Template Folder Edit	Unique
San MassEmail	name
Note: Templates must be Available For Use.	
Folder Edit	Save Delete Cancel
Email Template Folder Label MassEma	ail
Folder Unique Name MassEma	ail
Public Folder Access Read/Wri	te 🗸
	Unfiled Dublic Classic Email Templates

#### 1.2. Set up of Classic Email Template

- 1. Go to Setup→Email→ Classic Email Templates
- 2. Click "New Template"
- 3. Choose HTML (recommended)
- 4. Fill the required Fields as shown in the Image below
  - a. Make sure, you are on the correct folder
  - b. Merge Fields can be added
  - c. Don't forget to "checked" Available for use
- 5. Click Save.

When you save the template, the merge field will appe <u>View Sample Template</u>	ou can add substitute text to any merge field. Substitute sar in the email body of the template with the following s t will be listed as the title of any email activities you log	syntax: {!NullValue(Contact.FirstName,"Sir or		
Available Merge Fields				
Select Field Type		Select Field	Copy Merge Field Value	
Contact Fields	~	First Name 🗸	{IContact.FirstName}	
Copy and paste the merge field value into your template below.				
Email Template Edit	Save Save & New	Cancel		
Email Template Information				
Folder	MassEmail 🗸			
Available For Use				
Email Template Name	MassEmailFromCase			
Template Unique Name	MassEmailFromCase			
Don't Encoding	Unicode (UTF-8)	~		
Don't Description forget Subject				
forget	Hi {IContact.FirstName}			
Email Body	Hi (!Contact.FirstName)			
	Have a great day!			
	Thanks, Blaze Your Trail			miro

## 1.3. Set up of Organisation-Wide Email Address

- 1. Go to Setup→Email→Organisation-Wide Email Address
- 2. Click Add(You can re-use if you have one already)
- 3. Fill the Required Fields on the page
- 4. Specify the Profiles as necessary.(All or Selected)
- 5. Click Save.
- 6. Once Saved, the mail will be sent to the mentioned email to verify. (Don't forget to Verify from link sent to your mail)

	Save Save and New Cancel
Organization-Wide Email Address	
Display Name Email Address Purpose	User@byt.org User Selection Allow All Profiles to Use this From Address Allow Only Selected Profiles to Use the From Address
Profiles	Executive Management Fundraising and Development Office Staff Contract Manager Marketing User Solution Manager Standard User System Administrator Read Only Minimum Access - Salesforce
	Save Save and New Cancel

What is Organization-Wide Email Addresses ?

#### 1.4. Custom Labels

Note: It is important that you use the same label names as we used in the code. Customising this label requires modification of the code.

#### 1.4.1. Set up for EmailTemplateFolderID

- 1. Go to Setup→Custom Labels
- 2. Click New Custom Label
- 3. Enter "EmailTemplateFolderID" on Short Description
- 4. Name auto populates
- 5. Enter the exact Folder name in the value which you created in step 2.1
- 6. Click Save.

	Setup Home	Obj	ect Manager 🗸 🗸				
Q custo			SETUP Custom Labels	QMAT DINGT (THE SAULT AND MAT DINC)	(////**sss(/ *	Contraction (Contraction) (Con	
Cus	stom Labels					$\sim$ ) $\sim$	
	d what you're lookir Global Search.	ig for?	New Custom Label Custom Label Edit Short Description	Save Save & New Cancel EmailTemplateFolderID	Name	EmailTemplateFolderID	1
			Language	English	Protected Component		
	Email		Categories		i		
	Template		Value	MassEmail			
	Folder Name				1		
	_			Save Save & New Cancel			
						r	miro

#### 1.4.2. Set up for EmailTemplateID

- 1. Go to Setup→Custom Labels
- 2. Click New Custom Label
- 3. Enter "EmailTemplateID" on Short Description
- 4. Copy the ID in the URL from the Email Template
- 5. Paste the ID in the value, but drop the "2F" at the beginning of ID
- 6. Click Save.

SETUP Custom Lai	pels		
Custom Label EmailTemplateID			
Custom Label Edit	Save Save & New Cancel		
Sho	t Description EmailTemplateID Language English		Name EmailTemplateID
	Categories Value	Paste and delete th "2F"	-
	Save Save & New Cancel		
← → C (■ ıg/setup/	CommunicationTemplatesEmail/page?address=%2F00X8s000001IES9%3Fsetupid%3DCommuni	icationTemplatesE	mail 🍳 🖻 🖈 🗖 🧧
Small Giants Academy	Q Search Setup		×
Setup Home Object		py the	
Q, It	SETUR	from here	
Classic Email Templates	HTML Email Template		
Emai <mark>l t</mark> o Salesforce	MassEmailFromApplications		
Filter Email Tracking	Preview your email template below.		
Lightning Email Templates	Email Template Detail Edit Properties Edit HTML Version Edit Text Version Deter	Clone	
<ul> <li>Feature Settings</li> </ul>	Email Templates from Salesforce <u>MassEmail</u> Email Template Name MassEmailFromApplications	Available For U	ise 🗸
<ul> <li>Analytics</li> <li>Reports &amp; Dashboards</li> </ul>	Template Unique Name MassEmailFromApplications Classic Letterhead <u>NPSEP Sample Letterhead</u> Email Layout Free Free Form Letter	Last Used Di Times Us	miro

#### 1.4.3. Set up for OrgWideEmailID

- 1. Go to Setup→Custom Labels
- 2. Click New Custom Label
- 3. Enter "OrgWideEmailID" on Short Description
- 4. Enter your verified Email Address in the Value (You can use already verified Orgwide Email as well)
- 5. Click Save.

	Save Save and New Cancel	
Organization-Wide En	nail Address	
	Display Name Email Address Purpose User Selection Allow All Pofiles to Use this From Address Allow Only Selected Profiles to Use the From Address	
✓ User Interface		
Custom Labels		
Didn't find what you're looking for? Try using Global Search.	Custom Label OrgWideEmailID	
ny using Global Scarch.	Custom Label Edit	
	Short Description OrgWideEmailD Language English i Categories Value user@byt.org	Name OrgVVideEmailID
	Save & New Cancel	miro

#### 1.5. Apex in Developer console

Open Developer Console:

- 1. Click the Quick access menu on top right page (👰 )
- 2. Click Developer Console
- 3. Copy the codes from <u>BlazeYourTrail-GitHub</u>- and paste them to create the following classes/page
  - a. File→New→Apex Class→Enter "SendMassEmailController",
    - i. Delete the auto populated code and Paste the copied code and Save.
  - b. File→New→Visualforce Page→Enter"SendMassEmailFromCase",
    - i. Delete the auto populated code and Paste the copied code and Save..
  - c. File→New→Apex Class→Enter"SendMassEmailfromCase\_Test",
    - i. Delete the auto populated code and Paste the copied code and Save..
- 4. Once saved Click "Run Test" on SendMassEmailfromCase\_Test class.

5. To deploy Apex or package it for the Salesforce AppExchange, unit tests must cover at least 75% of your Apex code, and those tests

must pass.

File • Ec	dit • Debug • Test • Workspace • Help • < >						
SendMas	ssEmailController.apxc 🙁 SendListEmailFromCase.vfp 🗷 SendMass	EmailfromCase_Test.apxc	×				
Code C	Coverage: None 👻 API Version: 57 💌					_	Run Test Go To
1	@isTest					1	^
2 🗸	<pre>public class SendMassEmailfromCase_Test</pre>	{				Click to Run test	
3	@isTest					Runtest	
4 •	<pre>static void testMethod1(){</pre>						
5							
6	Contact con = new contact (Firs	tName=				blazeyourtrail.org',	MobilePhone='(
7	3 Click to						
8	Click to		Running tests synchronously 🙁			-	
9	<pre>see Test = new Case();</pre>		Success	-		2	
10	Coverage tId=con.Id; s='New';					-	
11							
12	insert pl;						
13						4	
14			· · ·				•
		roblems					2
Status T		Enqueued Time	Duration	Failures		Overall Code Coverage	»»
¥ =	😑 TestRun @ 2:57:35 pm 🛓 🔁 SendMassEmailfromCase_Test			0	1	Class )	Percent Lines
~	E testMethod1		0:00	-	-	SendMassEmailController	89% ni 53/59

What is Testing and Code Coverage?

#### 1.6. Create Button to invoke Apex codes

- 1. Click the Quick access menu on top right page ( $^{(2)}$ )  $\rightarrow$  Setup
- 2. Click on Object Manager Tab→Click on Case Object
- 3. Click Buttons, Links, and Actions
- 4. Click "New Buttons or Link"
- 5. Fill the Required Fields as per the Image below
- 6. Click Save.

stom Button or Link Edit	Save Quick Save Preview Cancel	Choose the	
Label	Send List Email	Name of the	
Name	Send_List_Email	VisualForce	
Description	sending mail from cases with VisualForcePages	Page	
Display Type	O Detail Page Link View example		
	O Detail Page Button View example	1	
	List Button View example	/	
	Display Checkboxes (for Multi-Record Selection)		
Behavior	Display in existing window with sidebar View Behavior Options		
Content Source	Visualforce Page 🗸		
	Content [SendListEmailFromCase [SendListEmailFromCase]		
	Save Quick Save Preview Cancel		

- 7. Add List Button Available
  - a. Setup→Object Manager→Case→Click List View Button

Layout  $\rightarrow$  Click drop down arrow  $\square$  on the right panel  $\rightarrow$  Edit

b. Click Save

SETUP > OBJECT MANAGER	SHIELE SHEESTEE THE ALL AND THE SHEESTEE THE A
Case	
<u>~</u>	Printable View [PrintableListView]
Details	Custom Buttons
Fields & Relationships	Available Buttons Selected Buttons
Case Page Layouts	None Send List Email
Case Close Page Layouts	Add Up Move the
Lightning Record Pages	Bernove Down Buttons
Buttons, Links, and Actions	Remove Down Buttons
Compact Layouts	
Field Sets	List View Actions in Lightning Experience
Object Limits	Available Actions Selected Actions
Record Types	New Child CaseNone
Related Lookup Filters	Add Up
Search Layouts	
List View Button Layout	Remove Down
Hierarchy Columns	mir

# 2. Validation of the build - Sample usage

Below steps illustrate how the above set up mass email functionality can be implemented in the front end (Slaeforce platform).

- 1. From the Applauncher Click on Cases Tab
- 2. Create a sample case with contacts (Don't forget to fill valid email-id)
- 3. Select Single/Multiple case from the List
- 4. Click "SendListEmail" Button on top right (VisualForcePage opens)
- 5. Choose the desired EmailTemplate from the Dropdown Menu

Send Mass Email		
You have selected	1 recipient	
Select Template	~	
Subject		
Body		
4		•
	Send Email Cancel	miro

- 6. Click "Send Email"
- 7. Once an email is sent, a Success Message will be shown.

Success: Email Sent Successfully
4
Send Email Cancel

8. Check the Sample contact's Inbox to check whether you received the selected Email/not

Note: Make sure the Setup→ Deliverability→All mails(selected), if you don't receive email while testing.

# 3. Deploy To Production

Deployment is logically split into 2 change sets. To perform deployment, System Administrator profile is required to Create/Upload/Deploy the Changesets.

### 3.1. Change Set 1 - Outbound (Sandbox)

Follow below steps to create change set 1 from sandbox.

- 1. Go to Setup→Outbound Change Sets
- 2. Click Continue
- 3. Click New
- 4. Enter Name and Description for your Change Set→Save
- 5. Under Change Set Components → Click Add
- 6. Under Component Type→Search by Type→Select the files

- 7. Click Add To Change Set
- 8. Click View/Add Dependencies- to select the dependent files easily
- 9. Select the files  $\checkmark$   $\rightarrow$  Add To Change Set.(Add the files as shown below)
- 10. Under Profile Settings For Included Components, Select the Profiles to add to the change set.

Note: The System Administrator profile should be selected as well as any profiles you have selected for Orgwide if it is not the System Administrator profile

Q outbound	Outbound Change Sets					
Workflow Actions     Outbound Messages     Environments	Change Set Upload History	Target Organization		Uploaded by		Status
<ul> <li>Environments</li> </ul>	13/6/2023. 10:49 am			Jessica Macoherson		Uploaded
<ul> <li>Change Sets</li> </ul>	13/6/2023, 10:49 am	Blaze Your Trail		Jessica Maconerson		Uploaded
Outbound Change Sets	Change Set Components					
Outbound Messages	Action Name	Parent Object	Туре		API Name	
o dia contra intersorges	View Source EmailTemplateFolderID		Custom Label		EmailTemplateFolderID	
	View Source EmailTemplateID		Custom Label		EmailTemplateID	
Didn't find what you're looking for?	MassEmail		Classic Email Template Folder		MassEmail	
Try using Global Search.	View Source MassEmailFromCase		Email Template		MassEmail/MassEmailFromCase	
	View Source OrgWideEmailD		Custom Label		OrgWideEmailID	
	View Source SupportUpdate		Email Template		MassEmail/SupportUpdate	
	Profile Settings For Included Components					
	Action Name		AP	1 Name		
	View Source Blaze Your Trail Executive Assistant		Bia	ize Your Trail Executive Assistant		miro
	View Source System Administrator		Ad	min		

- 11. Click Upload
- 12. Choose production
- 13. Click Upload

For further support, refer to <u>How to add components to Deploy</u> from Salesforce Support.

## 3.2. Change Set 1 - Inbound (Production)

Follow below steps to validate & deploy change set 1 into production.

- 1. Go to Setup→Inbound Change Sets
- 2. Click Continue
- 3. Under Changesets Awaiting Deployment→ Click on Change Set Name
- 4. Choose Default(Since our First Changeset doesn't have Apex)
- 5. Click Validate
- 6. Click OK to Confirm after reviewing the dialogue Box
- 7. Click Deployment Status to see if the Validation Succeeded/not
- 8. Click Deploy, After the successful validation
- 9. Choose Default

- 10. Click Deploy
- 11. Click OK to Confirm after reviewing the dialogue Box
- 12. Click Deployment Status to check the Deployment Succeeded/Failed

For further support, refer to <u>How to Validate and Deploy</u> in Production from Salesforce Support.

#### 3.3. Update EmailTemplateID

Below configuration is required in production after the deployment of change set 1.

- 1. Go to Setup→Custom Labels
- 2. Find "EmailTemplateID" →Click Edit
- 3. Copy the ID in the URL from the Email Template
- 4. Update the ID in the value, but drop the "2F" at the beginning of ID (refer to image in section <u>2.4.2</u>)
- 5. Click Save.
- 6. Make sure the "OrgWideEmailID" custom Label also contains the verified Email value as the production OrgWideEmail

#### 3.4. Change Set 2 - Outbound (Sandbox)

Follow below steps to create change set 2 from sandbox.

- 1. Go to Setup→Outbound Change Sets
- 2. Click Continue
- 3. Click New
- 4. Enter Name and Description for your Change Set→Save
- 5. Under Change Set Components→ Click Add
- 6. Under Component Type→Search by Type→Select the files 🗹
- 7. Click Add To Change Set
- 8. Click View/Add Dependencies- to select the dependent files easily
- 9. Select the files →Add To Change Set.(Add the Apex classes and Visualforce Page as shown in the image below)
- 10. Under Profile Settings For Included Components, Select the Profiles to add to the change set.

	-				
Q change	<b>Outbound Change Sets</b>				
AppExchange Marketplace		Delete Upload Clone			
✓ Change Sets	Change Set Upload History				
Inbound Change Sets Outbound Change Sets V Integrations	Uploaded on 13/6/2023, 11:07 am	Target Organization Blaze Your Trail	Uploaded by Jessica Macoherson		Status Uploaded
Change Data Capture	Change Set Components				
Didn't find what you're looking for? Try using Global Search.	Action Name Versiones Send List Email Versioners Send List Email Versioners SendklassEmailController Versioners SendklassEmailtonCase_Text	Parent Object Cate	Type Button or Link Aper Class Visuations Page Aper Class	API Name Case Send_List_Email SendMassEmailFomCase SendMassEmailFromCase SendMassEmailFromCase_Test	
	Profile Settings For Included Components Action Vers Source Blace Your Trail Executive Assistant Vers Source System Administrator		API Name Blace Your Trail Executive Assistant Admin		miro

- 11. Click Upload
- 12. Choose Production
- 13. Click Upload

## 3.5. Change Set 2 - Inbound (Production)

Follow below steps to validate & deploy change set 2 into production.

- 1. Go to Setup→Inbound Change Sets
- 2. Click Continue
- 3. Under Changesets Awaiting Deployment  $\rightarrow$  Click on Change Set Name
- 4. Choose "Run specified tests" (Since our Second Changeset includes Apex classes)
- 5. Enter "SendMassEmailfromCase\_Test " at text area
- 6. Click Validate
- 7. Click OK to Confirm after reviewing the dialogue Box
- 8. Click Deployment Status to see if the Validation Succeeded/not
- 9. Click Deploy, After the successful validation
- 10. Choose Default
- 11. Click Deploy
- 12. Click OK to Confirm after reviewing the dialogue Box
- 13. Click Deployment Status to check the Deployment Succeeded/Failed

## 3.6. Enable Send List email Button

Through change set - 1 & 2, send email functionality is deployed. However to show the button option visibility, add the List Button (Send list email) to the Cases List View layout

SETUP > OBJECT MANAGER Case	OMBLE DASSETT CLEURS ALLS LE SAMMONMERT DASSETT CLEURS AL
	Printable View [PrintableListView]
Details	Custom Buttons
Fields & Relationships	Available Buttons Selected Buttons
Case Page Layouts	None Send List Email
Case Close Page Layouts	Add Up Move the
Lightning Record Pages	Button to Selected
Buttons, Links, and Actions	Remove Down Buttons
Compact Layouts	
Field Sets	List View Actions in Lightning Experience
Object Limits	Available Actions Selected Actions
Record Types	New Child Case
Related Lookup Filters	Add Up
Search Layouts	
List View Button Layout	Remove Down
Hierarchy Columns	miro

After completing the above step, below will be the view of Cases layout.

Blaze your Trail Q Search	*- 🖬 🚓 ? 🌣 🐥 🔵		
Blaze Your Trail Home Leads $\checkmark$ Contacts $\checkmark$	Accounts 🗸 Cases 🗸 Opportunities 🗸 Dashboards 🗸 More 🔻 🌶		
Cases Recently Viewed  F 2 items • Updated 7 minutes ago New Change Owner Merge Cases Send List Email Q Search this list Q Search this list			
Cas ∨ In short words, what's the issue?	✓ St ∨ Date/Time Op ∨ Case ∨		
1 000011	Case 💌		
2 000013			

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