How to Send Mass Emails From Case

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.
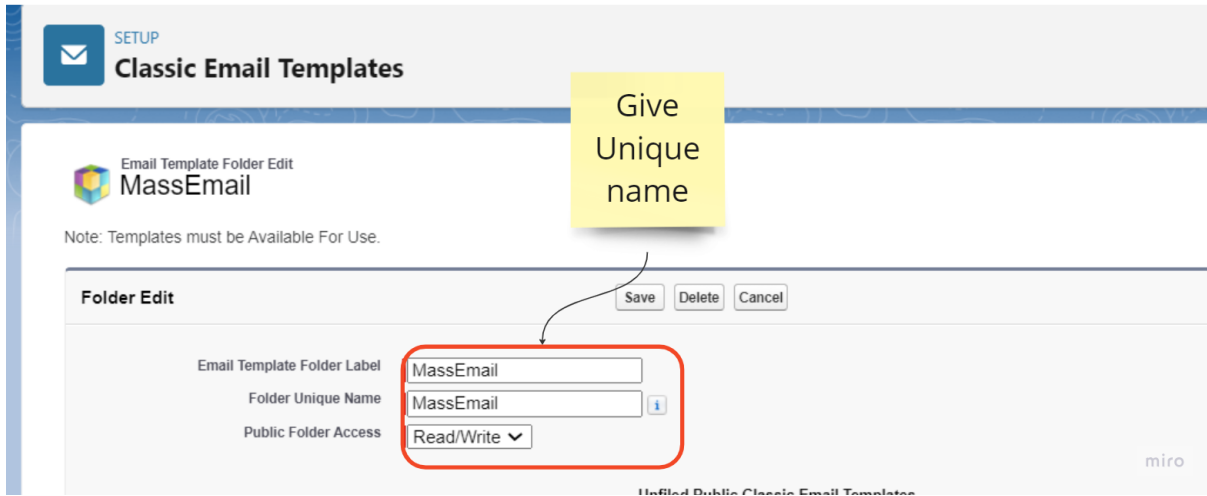
1. Process to set up

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)
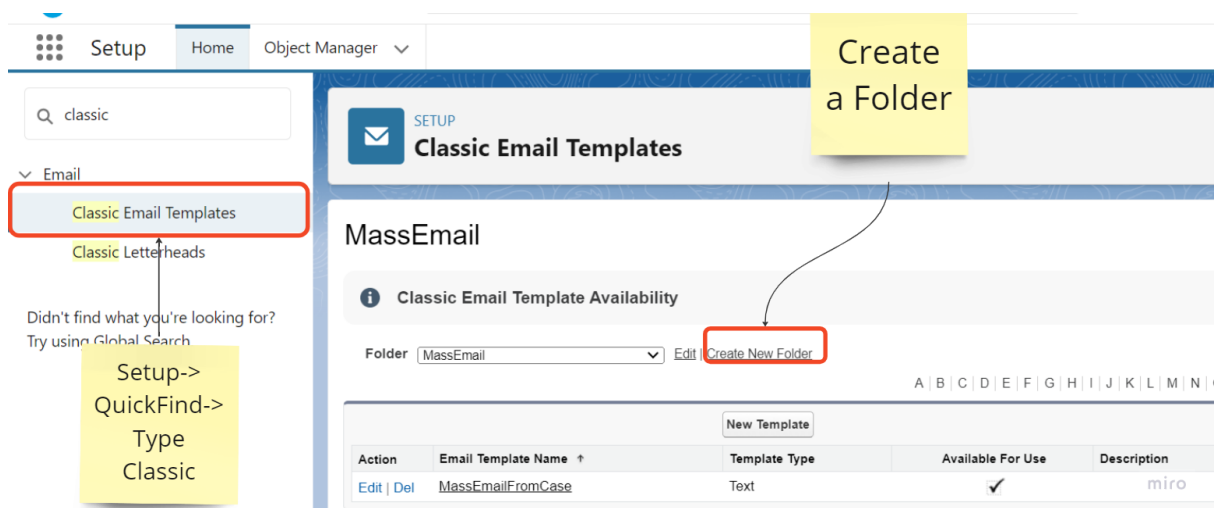
3. Enter Folder Label
   a. Folder Unique Name auto populates
   b. Make sure Folder Access is "Read/Write"
4. Click Save.

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.

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)

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.
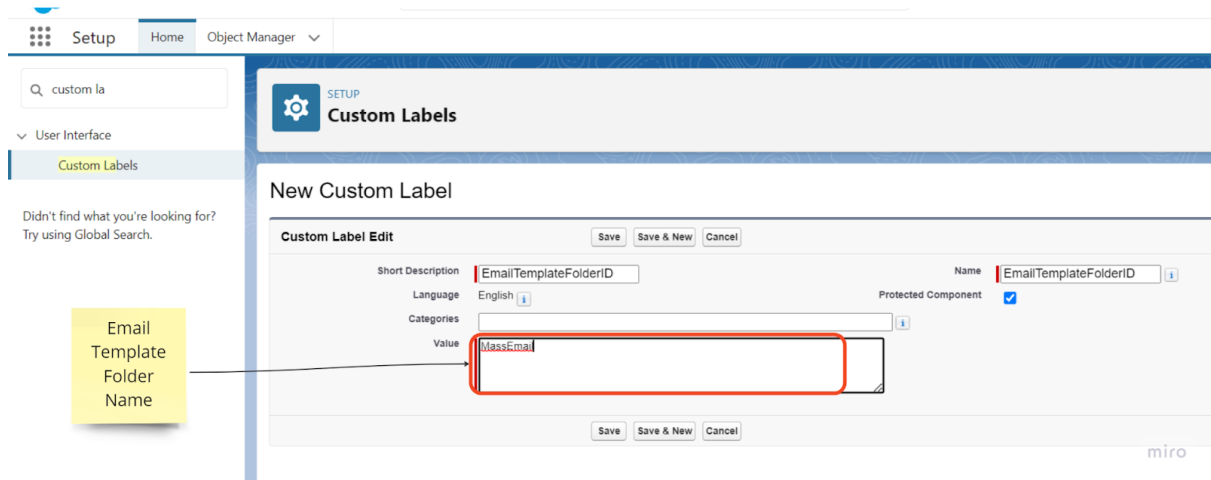
1.4.2. Set up for EmailTemplateID

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.
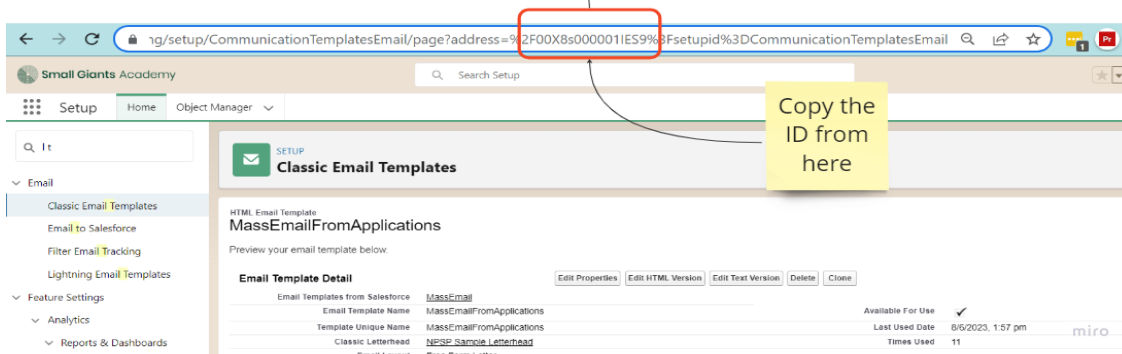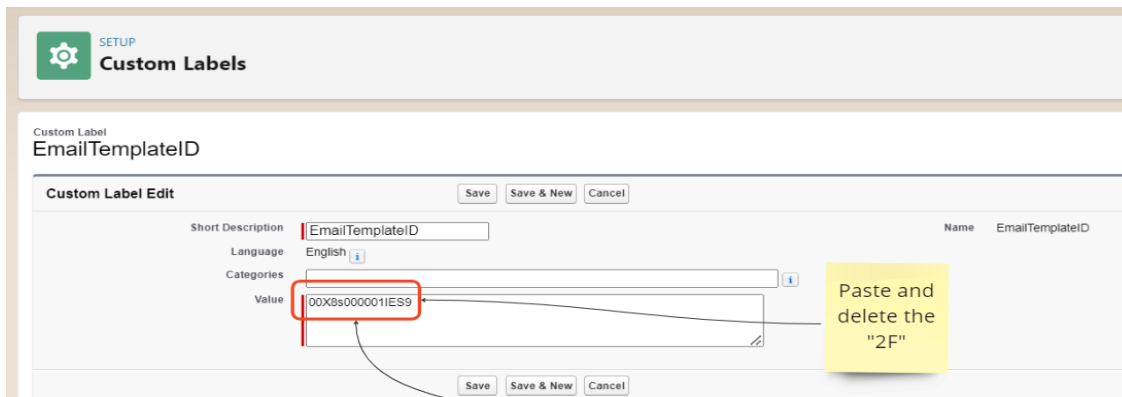
1.4.3. Set up for OrgWideEmailID

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.
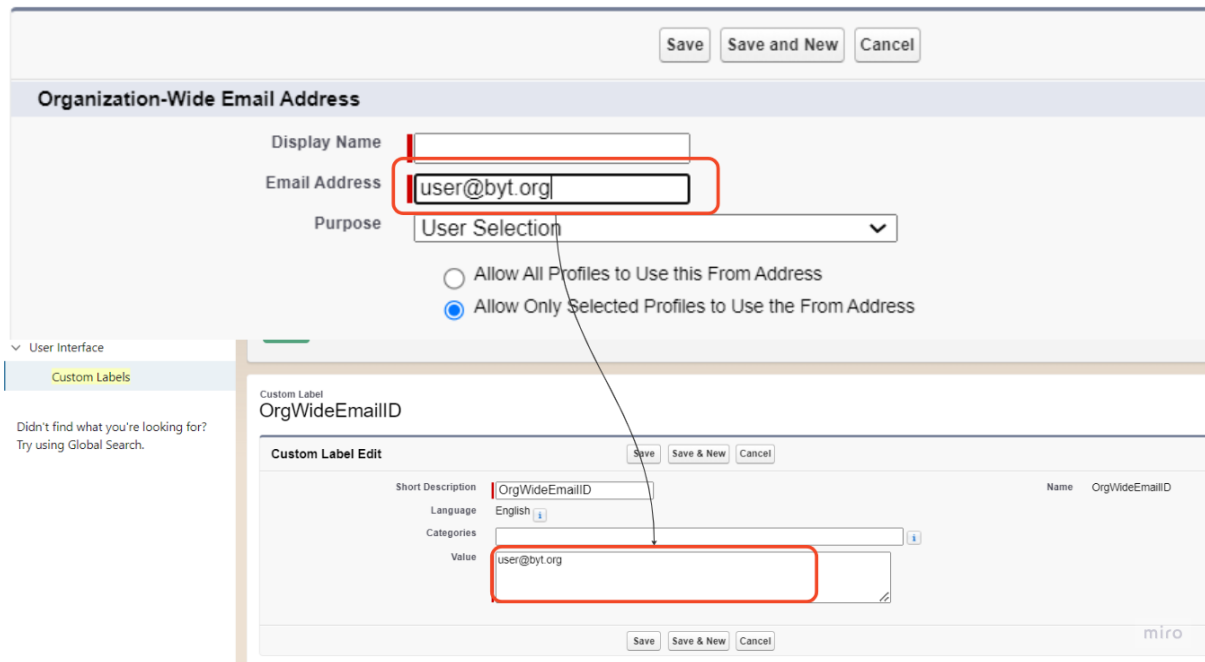
1.5. Apex in Developer console

Open Developer Console:

1. Click the Quick access menu on top right page(⚙)
2. Click Developer Console
3. Copy the codes from [BlazeYourTrail-GitHub](#)- 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.
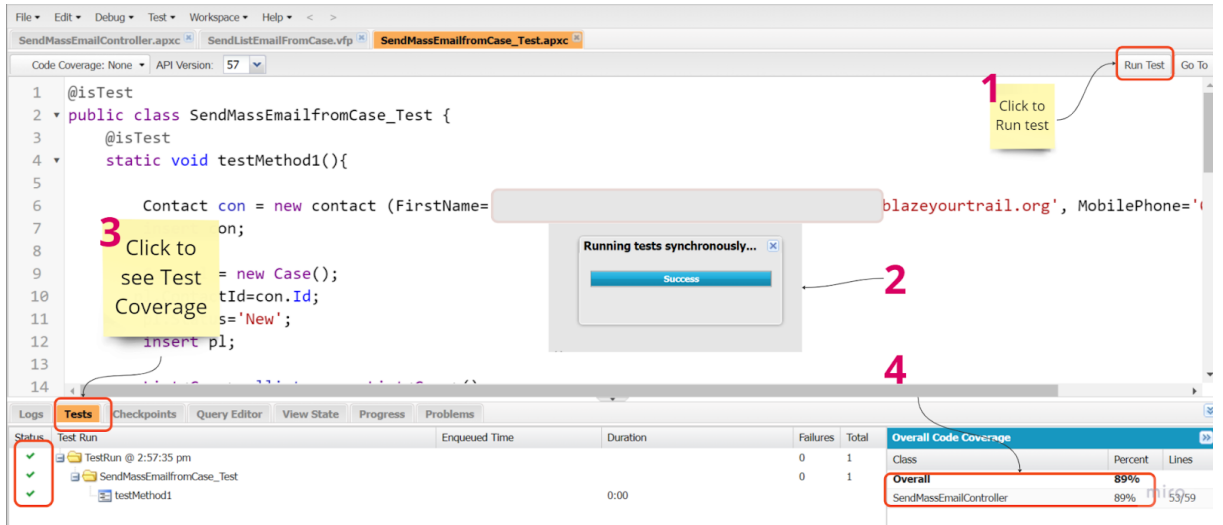
What is Testing and Code Coverage?

1.6. Create Button to invoke Apex codes

1. Click the Quick access menu on top right page(⚙) → 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.
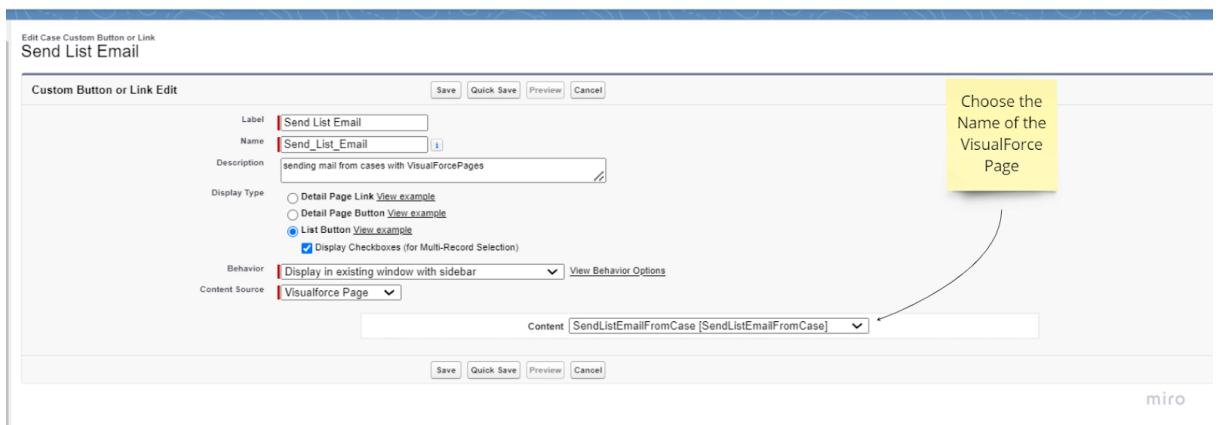
7. Add List Button Available

    a. Setup→Object Manager→Case→Click List View Button Layout→Click drop down arrow ▾ on the right panel→Edit

    b. Click Save
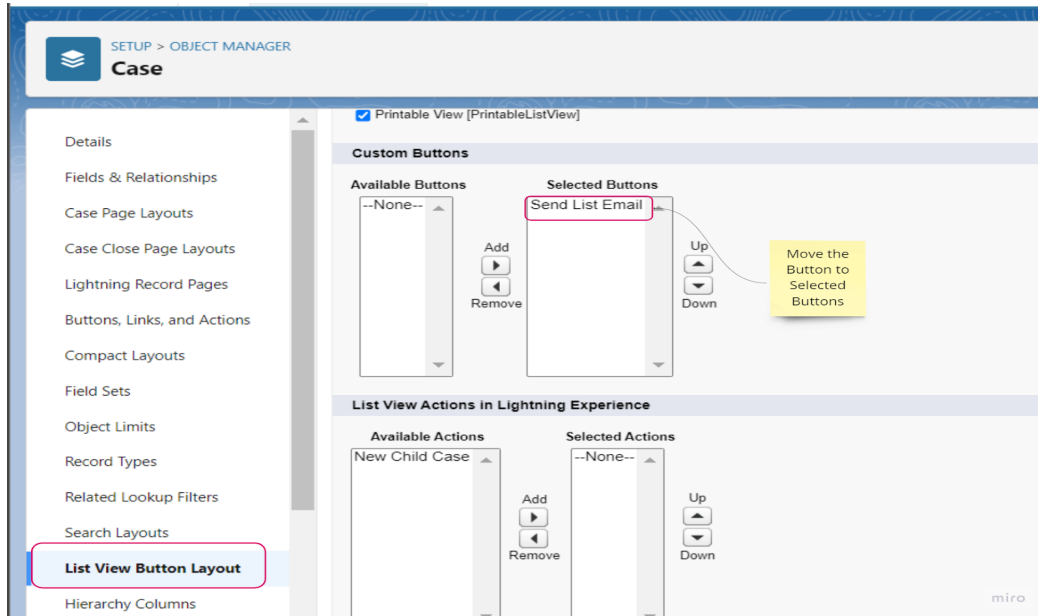
2. Validation of the build - Sample usage

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   --Select--

Subject

Body

Send Email   Cancel

miro

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

✓ Success:
Email Sent Successfully

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 ☑ →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

11. Click Upload

12. Choose production

13. Click Upload

For further support, refer to [How to add components to Deploy](#) 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 [How to Validate and Deploy](#) 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 [2.4.2](#))
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.
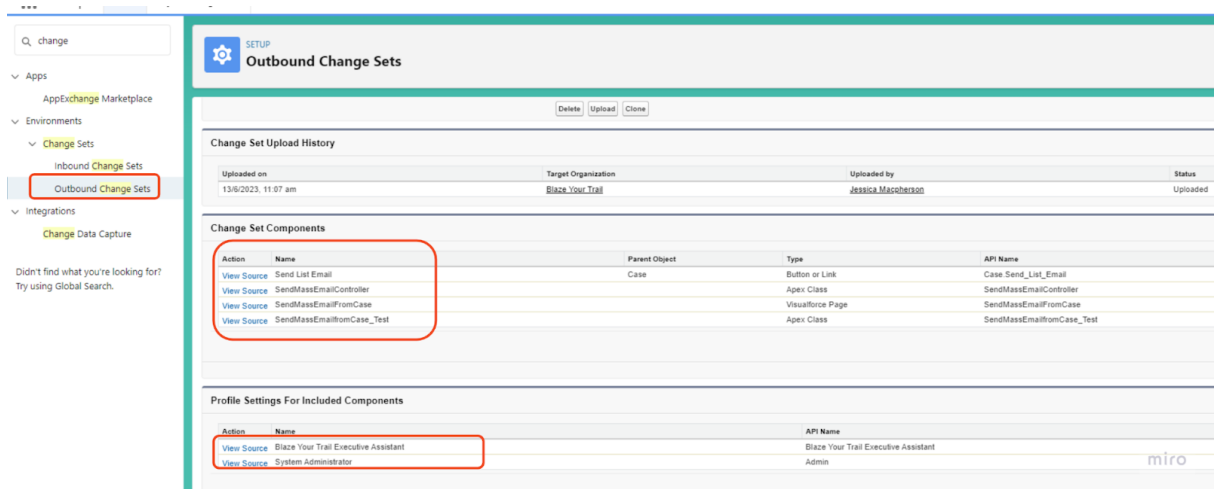
11. Click Upload

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→ 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
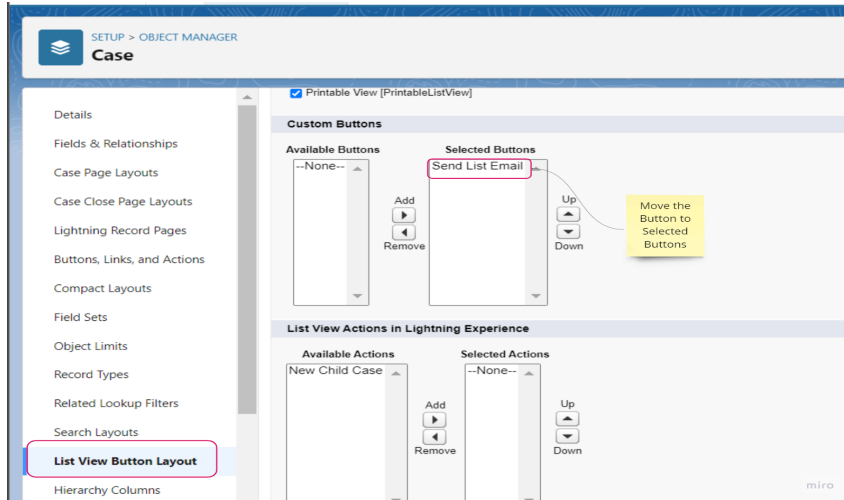
After completing the above step, below will be the view of Cases layout.
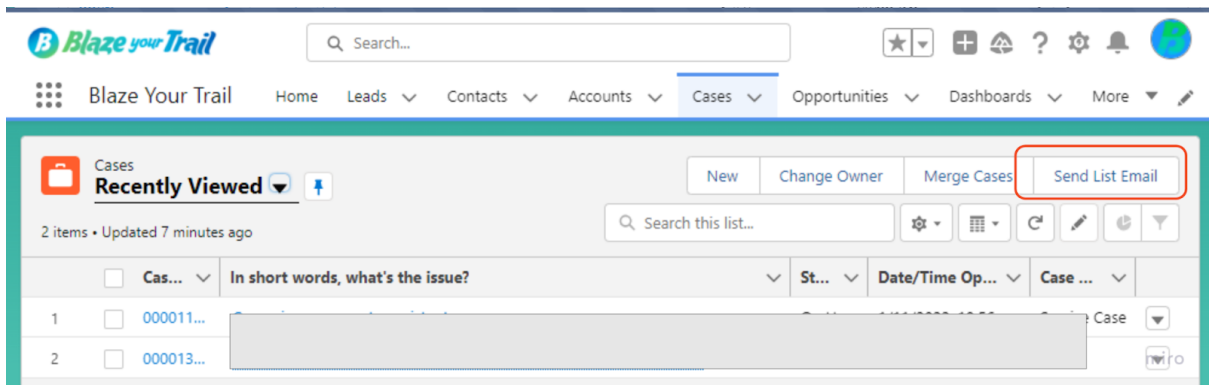
Document Prepared by Selvazhaki Govindarasu, June 2023