EMAIL MARKETING

User Manual Version 1.0

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Introduction

The BMS Marketing application automate the processes involved in working of and its SALESFORCE business to send personalized bulk emails to users and contacts.

Who should use this manual

This manual is specific to the all Salesforce user who installed BMS Marketing application on salesforce.

Process Overview

Install application on app exchange salesforce platform to your system Login to your salesforce account go to app Launcher search for “BMS Marketing” click on application.
In BMS Marketing app go to email marketing tap from here we can create records or we can import records, in email frequency tab set email frequency from picklist, add batch size and date Time at what time you want to send emails to respective user, we can also create custom email templet bases on user requirements.

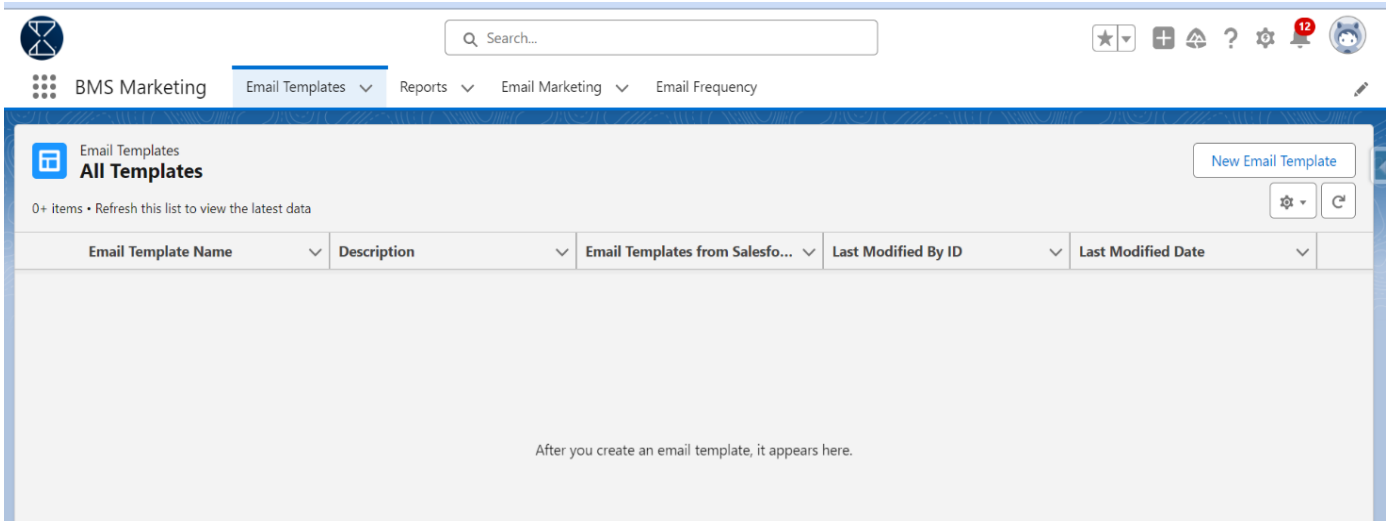
Where to find

Go To App Launcher

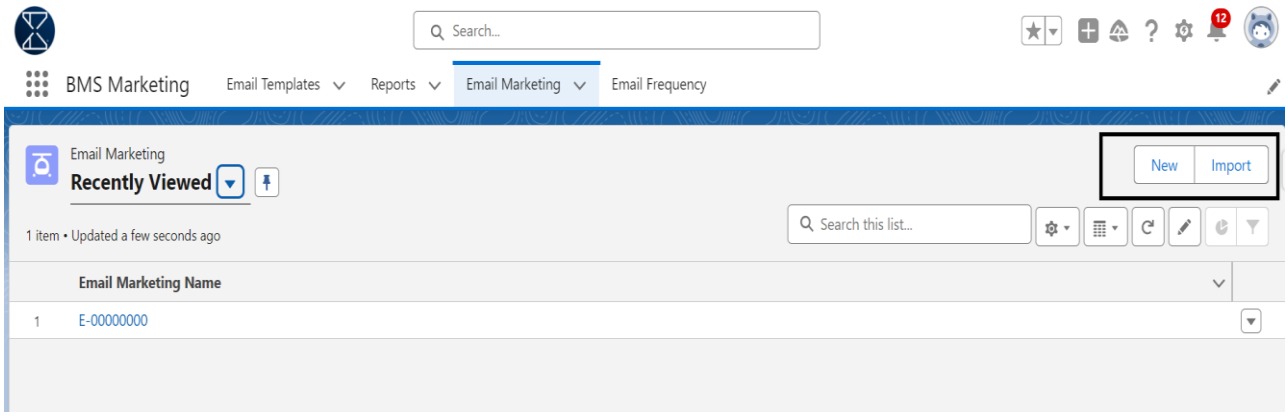
- ➔ Enter BMS Marketing.

Usage Documentation

After install app go to Launcher search for “BMS Marketing” click on app
The following screen appears:



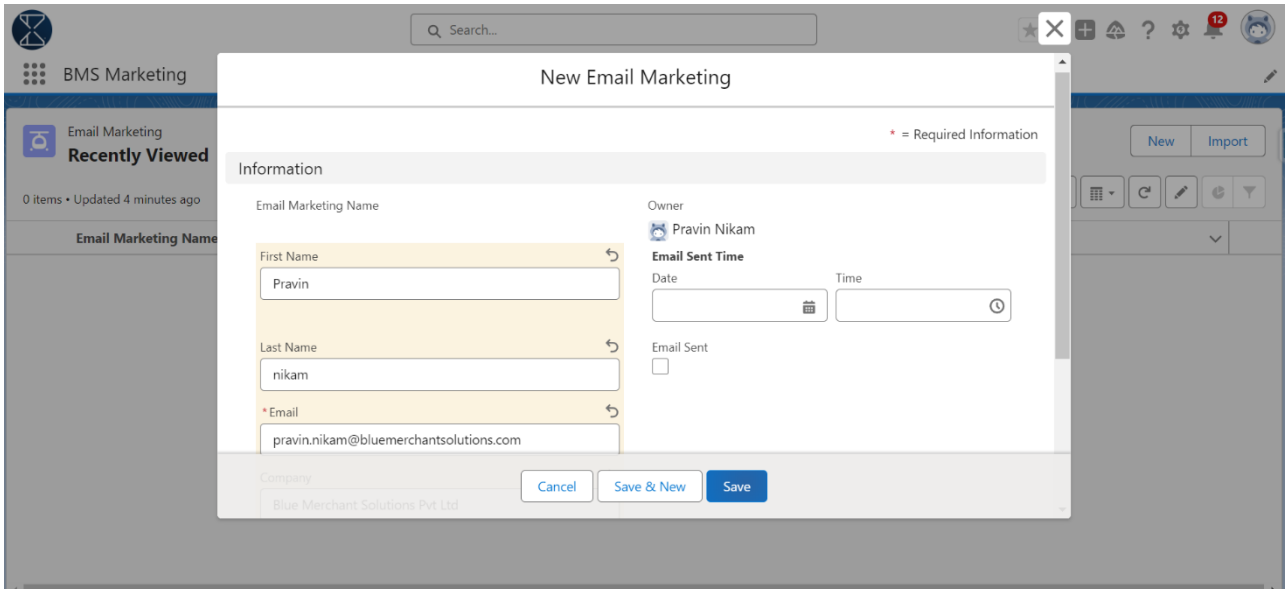
On the BMS Marketing app go to Email Marketing Tab.



Form hear you can create new record or import records

To create new Record

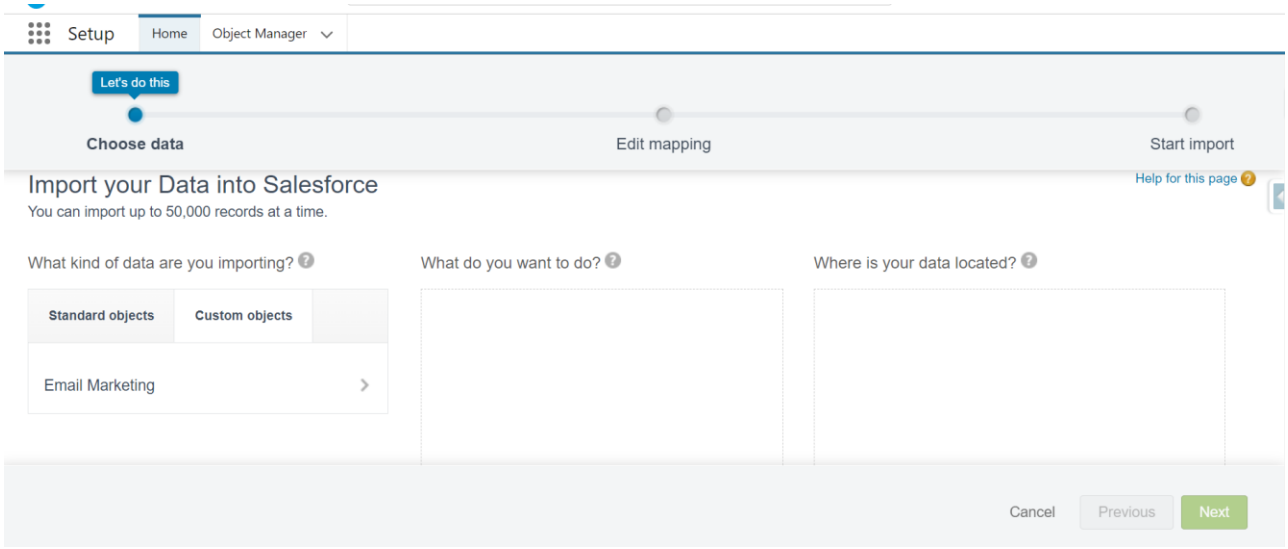
Click on new button open bellow modal:



From this modal you can create new record add Name, Email Id to whom want to send email, Email sent time and email sent check box remain as it is fill other details then save.

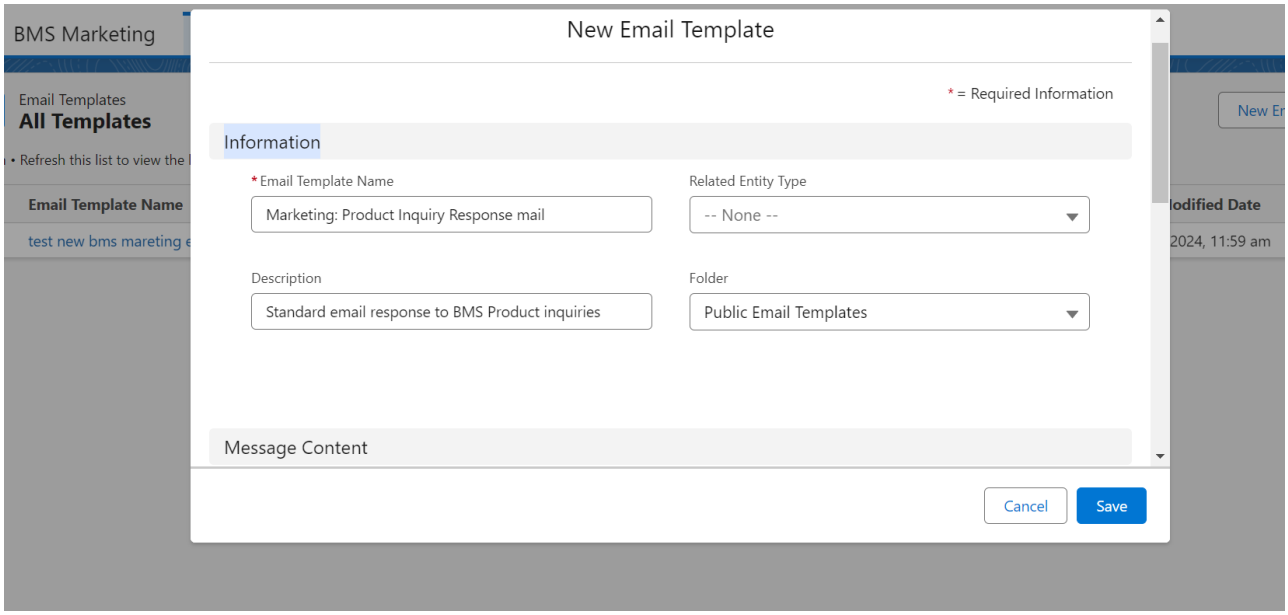
To Import Record

Once click on Import it will opens bellow modal:

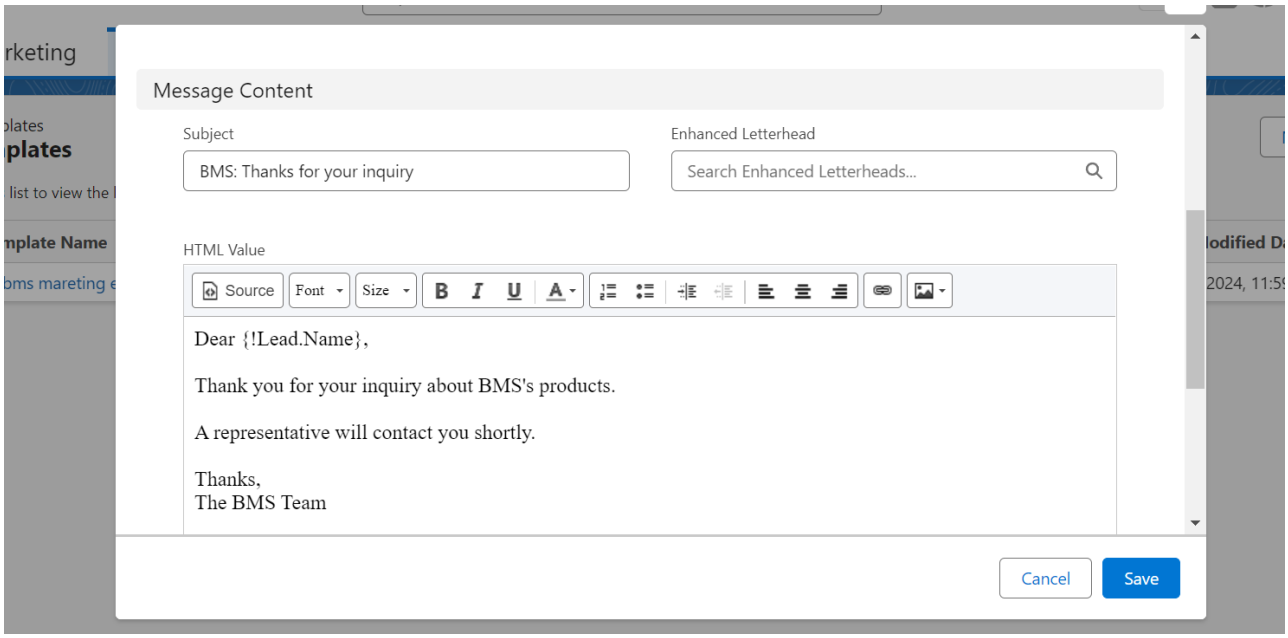


Import record once import all records appairs under Email Market tab.

Now go to Email Templet Tab click on new from heare user can create custom email templet bases on user requirements.



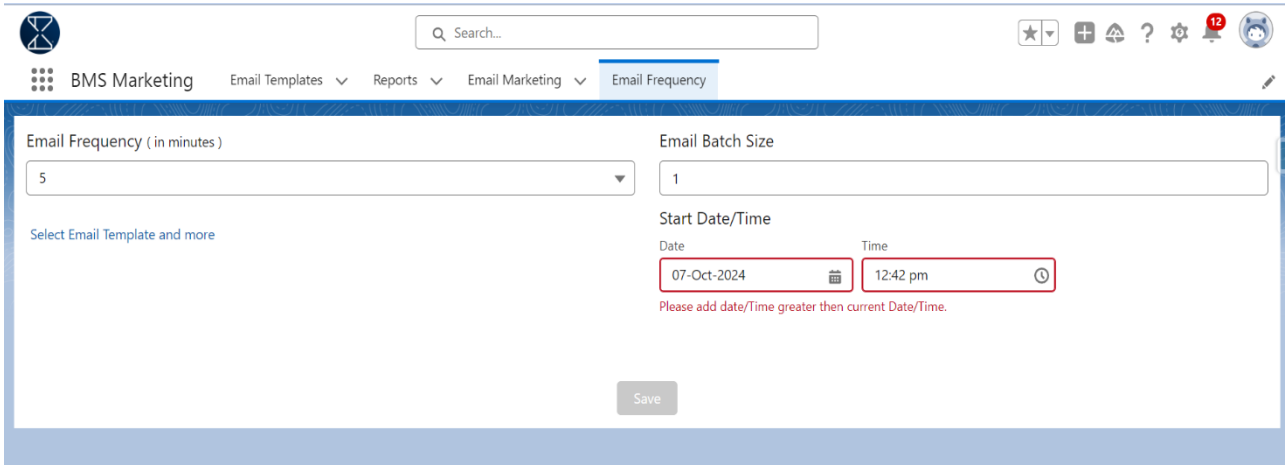
Add templet Basic details scroll down bellow you will see bellow Message content :



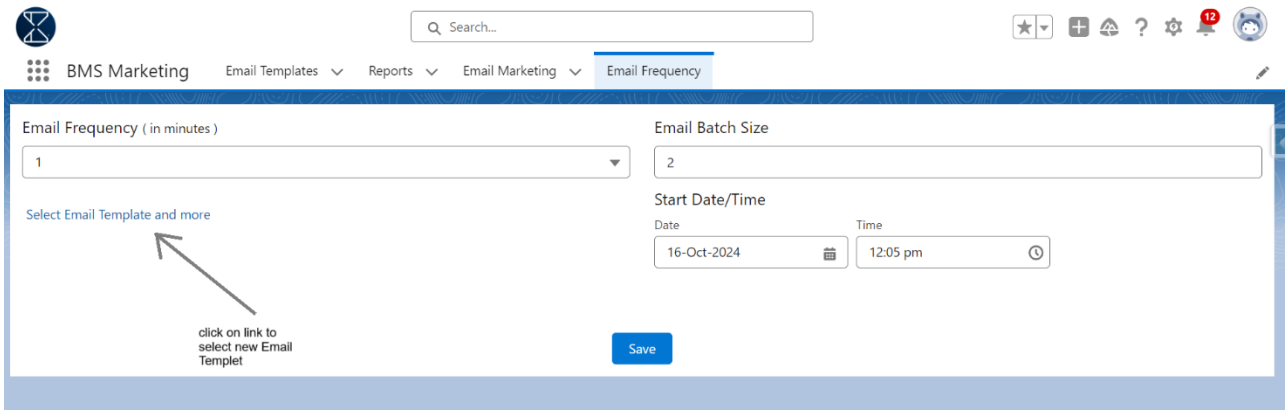
Add Email Subject and Eamil Body bases on user requirmets. save the templet it will create new custom templet for you. Now you can use this templet using from email market link.

To Set Email Frequency

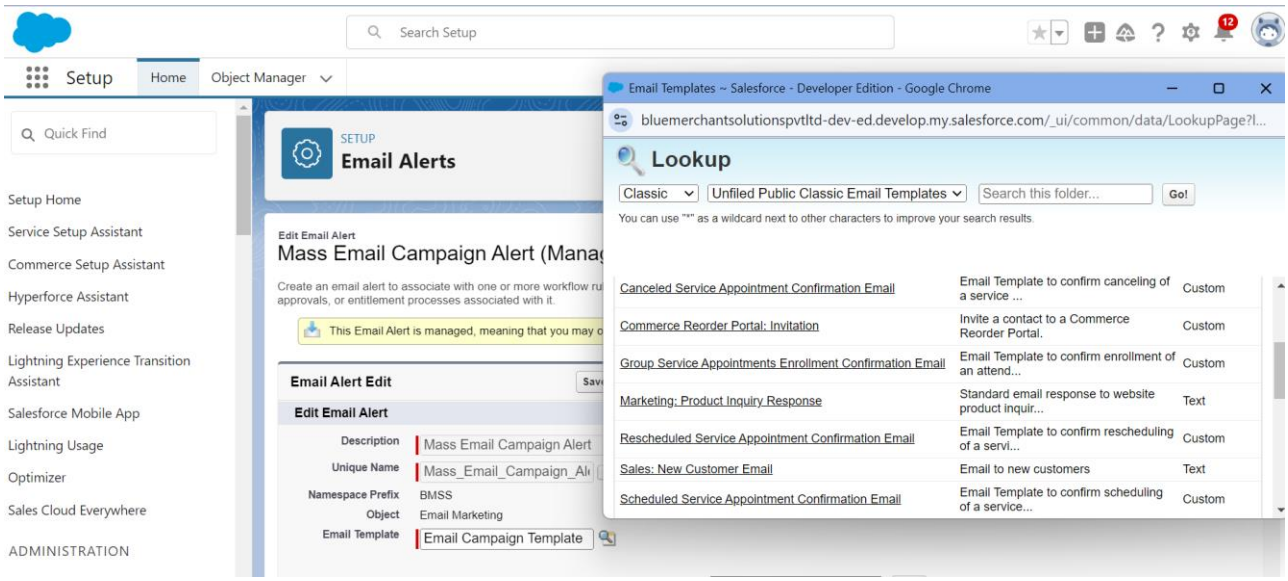
Now go to Email Frequency Tab you will see Bellow user interface:

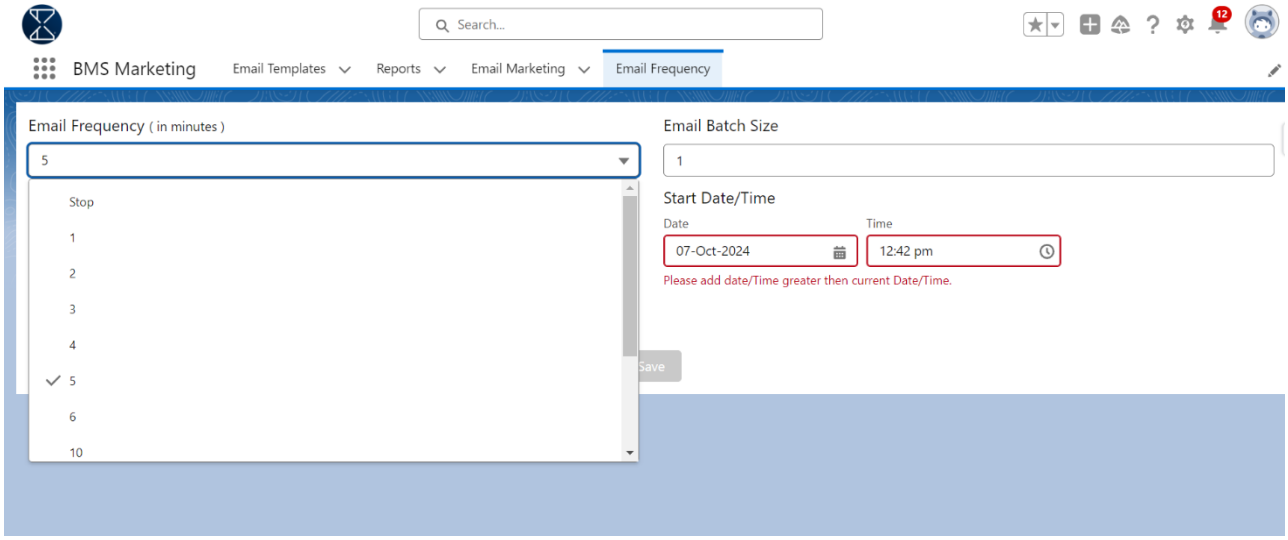

Search...
BMS Marketing
Email Templates
Reports
Email Marketing
Email Frequency
Email Frequency (in minutes)
5
Email Batch Size
1
Select Email Template and more
Start Date/Time
Date
Time
07-Oct-2024
12:42 pm
Please add date/Time greater then current Date/Time.
Save

To set new custom email templet click on Select Email Templet Link it will redirect to Email Alert setup page.



Setup page you will See all templet as shown as bellow select templet and save.



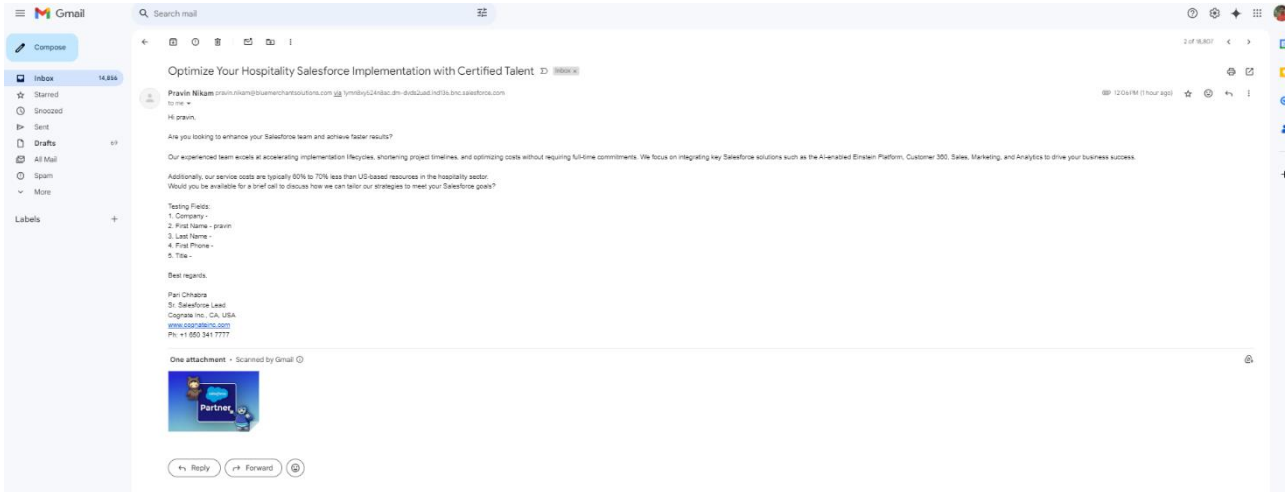


Select Email frequency in minutes, Email batch size and start date/time at which time you want to scheduled batch and save record.

Note: Date/Time is always greater than current time.

Once Email Frequency record saved it will be scheduled job enqueued for you. You can see in setup. Once batch executes and email will send to user/ records.

You can see example of it as bellow:



Help and Support

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