

EMAIL MARKETING

User Manual Version 1.0

Blue Merchant Solutions Pvt Ltd Noida UP, India.

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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.

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* * * * * * * * *	BMS Marketing	Email Templates 🗸	Reports 🗸	Email Marketing 🗸	Email Frequency		/
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	Email Marketing Nam	ie					~
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Form hear you can create new record or import records

To create new Record

Click on new button open bellow modal:

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BMS Marketing	New Em			
Email Marketing Recently Viewed	Information		* = Required Information	New Import
0 items • Updated 4 minutes ago Email Marketing Name	Email Marketing Name	Owner Owner Travin Nikam Email Sent Time Date	Time	
	Last Name t	Email Sent		
	*Email pravin_nikam@bluemerchantsolutions.com			
	Blue Merchant Solutions Pvt Ltd	Save & New Save		

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:

	Edit mapping		Start import
into Salesforce) records at a time.			Help for this page 🥑
u importing? 🔞	What do you want to do? 🕢	Where is your data located?	
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	into Salesforce precords at a time. u importing? ustom objects	Edit mapping Edit mapping Concernent of the second set a time. Unimporting? What do you want to do? ustom objects	Edit mapping Edit mapping Market Seconds at a time. What do you want to do? Where is your data located? Where is your data located?

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.

BMS Marketing	New Email Template										
Email Templates All Templates	Information		* = Required Information	New Er							
• Refresh this list to view the Email Template Name test new bms mareting e	*Email Template Name Marketing: Product Inquiry Response mail Description Standard email response to BMS Product inquiries	Related Entity Type None Folder Public Email Templates	▼	lodified Date 2024, 11:59 am							
	Message Content		Cancel Save	•							

Email Marketing Application

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

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	Message Content	11 C <i>Z ////</i>
olates	Subject Enhanced Letterhead	
plates	BMS: Thanks for your inquiry Search Enhanced Letterheads Q	
list to view the l		
mplate Name	HTML Value	lodified D
bms mareting e	Image: Source Font → Size → Image: Size → Ima	2024, 11:5
	Dear {!Lead.Name},	
	Thank you for your inquiry about BMS's products.	
	A representative will contact you shortly	
	A representative will contact you shortly.	
	Thanks, The BMS Team	
		-
	Cancel	/e

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:

	Q Search				A ?	ţ.	12	6
BMS Marketing Email Templates V Reports	✓ Email Marketing ✓	Email Frequency		C INSTO	111:5		11:411110	, Jillit C
Email Frequency (in minutes) 5 Select Email Template and more		Email Batch Size 1 Start Date/Time Date 07-Oct-2024 Please add date/Time great	Time 12:42 pm er then current Date/Time.	0				
		Save						

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

BMS Marketing Email Templates V Repo	Q Search Is v Email Marketing v Email Frequency	** 🗄 🏟 ? 🌣 😤 🐻
Email Frequency (in minutes) 1 Select Email Template and more Olick on link to select new Email Templet	Email Batch Size 2 Start Date/Time Date 16-Oct-2024	Time

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



Q Search BMS Marketing Email Templates V Reports V Email Marketing V	Email Frequency
Email Frequency (in minutes) 5 Stop 1 2 3 4 ✓ 5 6 10	Email Batch Size 1 Start Date/Time Date Time 07-Oct-2024 12:42 pm O Please add date/Time greater then current Date/Time. 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:

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Inbox Strete Stretee Streteee Streteee Streteee Streteeee Streteeeeeeeeeeeeeeeeeeeeeeeeeeeeeee	4,336 49 +		Pravin Nil to me + H pravin. Are you loo Our experie Additionality Wead you! J. Frant Name 3. Lost Nam 3. Lost Nam 4. Frant Prov 5. Tite - Best regard Pari Christian Prix +160 One attac	ting to entry our service sour sour service sour sour service sour sour sour sour sour sour sour sour	ince your Sal ercets at account of the same type or costs are type for a brief ca	erchansour leatoros tea sterating im pically 60%	m od jansan <u>av</u> yndegoladau m od jansen teer reuth gleenste fersen teer reuth gleenste fersen it de gener gleenste fersen of de gener gleenste fersen of de gener her we en blêr our oed	2 7 renng project time resources in the he resources to meet your'	States and optimizing of extreme and optimizing of oppinally sector. Satestone position?	costs without wegurin	ning NJ-Gme comm	nonitments. We	e boux on integration	g key Salestora s	solutions such as t	the Al-enabled E	Instein Pietorn, C	storner 300. Sak	s, Marketing, and	I Analytics to drive	GB 12	COSINI (Thour spei)	☆ €) +1	e 1	€ 1 +
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Help and Support

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