



# 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.

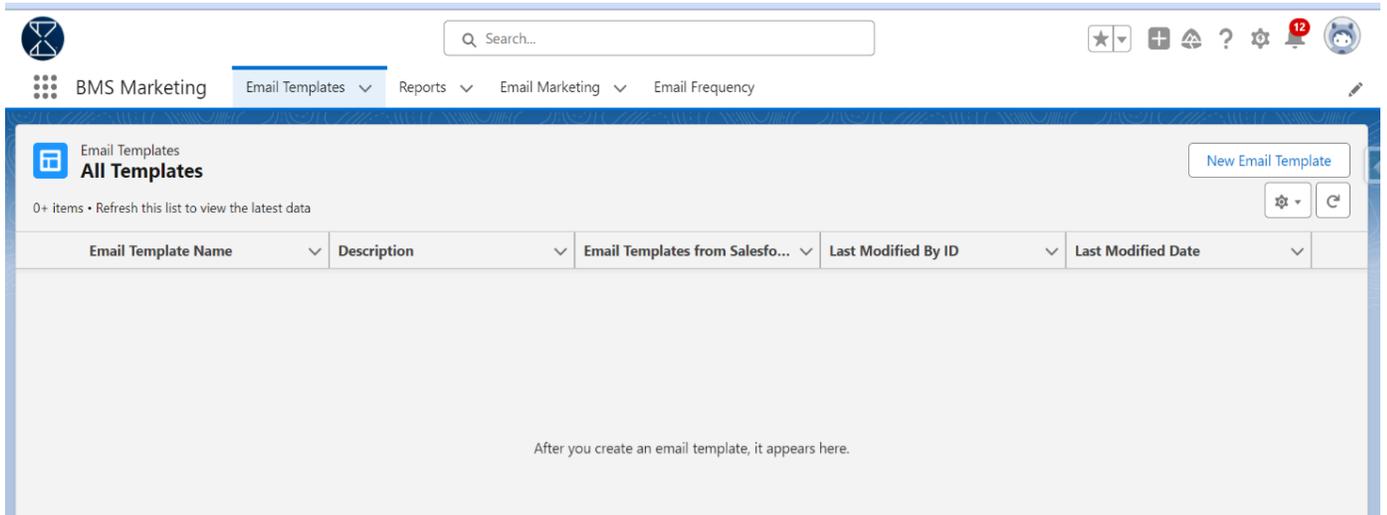
## **Where to find**

Go To App Launcher

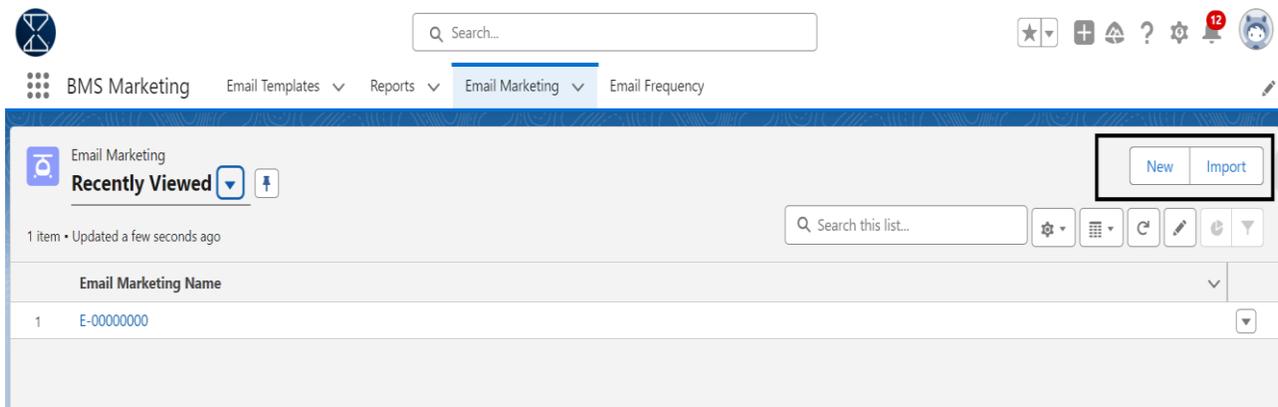
➔ Enter BMS Marketing.

## Usage Documentation

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



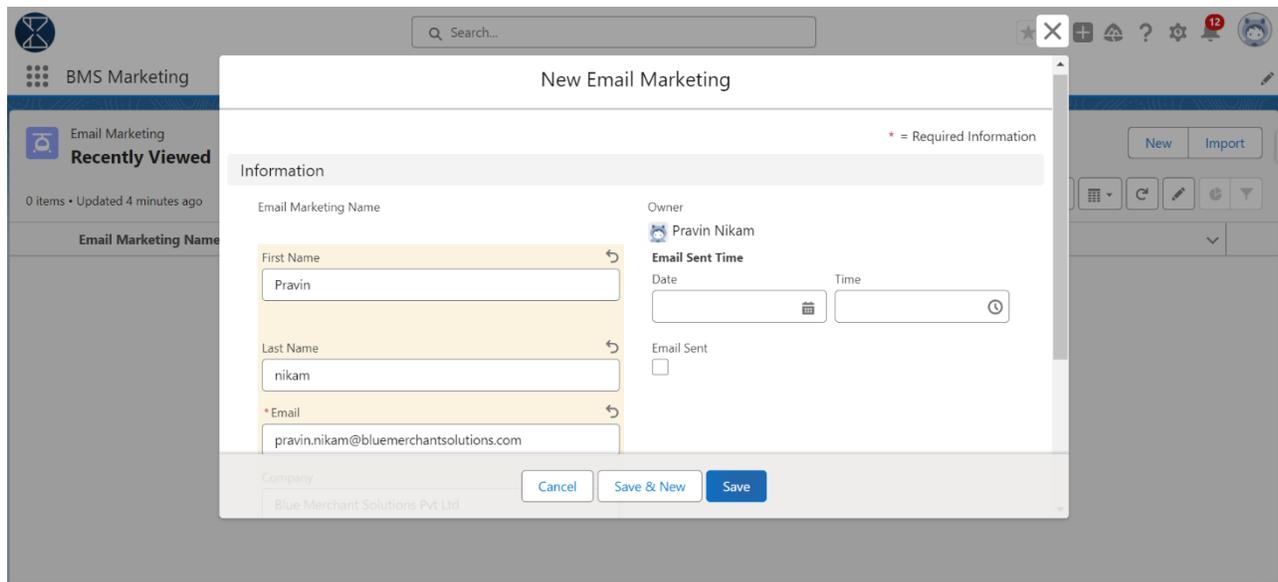
On the BMS Marketing app go to Email Marketing Tab.



Form here you can create new record or import records

## To create new Record

Click on new button open bellow modal:



The screenshot shows a web application interface with a modal window titled "New Email Marketing". The modal contains the following fields and controls:

- Information** (Section Header)
- Email Marketing Name**:
  - First Name: Input field with "Pravin" entered.
  - Last Name: Input field with "nikam" entered.
  - \* Email: Input field with "pravin.nikam@bluemerchantsolutions.com" entered.
- Owner**: Dropdown menu showing "Pravin Nikam".
- Email Sent Time**:
  - Date: Calendar icon.
  - Time: Time picker icon.
- Email Sent**: Check box (unchecked).
- Company**: Text field with "Blue Merchant Solutions Pvt Ltd".
- Buttons**: "Cancel", "Save & New", and "Save".

A legend indicates that "\*" denotes Required Information.

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:

Let's do this

Choose data Edit mapping Start import

Help for this page

### Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? What do you want to do? Where is your data located?

Standard objects Custom objects

Email Marketing

Cancel Previous Next

Import record once import all records appears 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.

New Email Template

\* = Required Information

Information

\* Email Template Name Marketing: Product Inquiry Response mail Related Entity Type -- None --

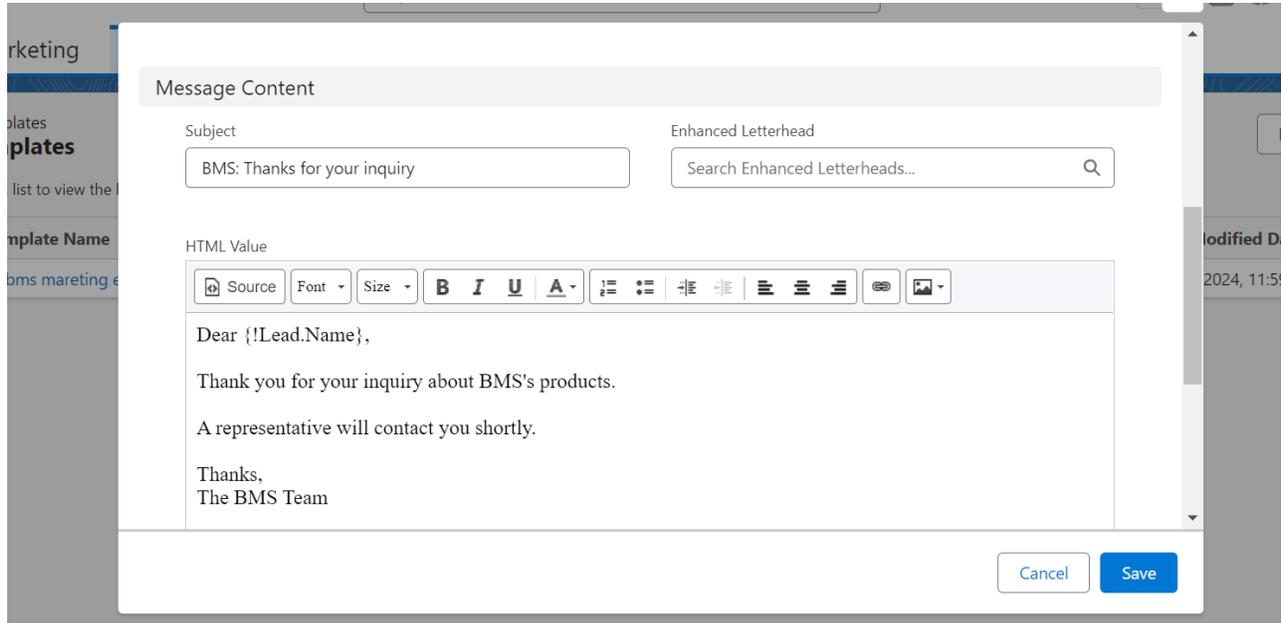
Description Standard email response to BMS Product inquiries Folder Public Email Templates

Message Content

Cancel Save



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



Add Email Subject and Email Body based on user requirements. Save the template; it will create a new custom template for you. Now you can use this template using an email market link.

## [To Set Email Frequency](#)

Now go to Email Frequency Tab; you will see the following user interface:

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**BMS Marketing** | Email Templates | Reports | Email Marketing | **Email Frequency**

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Email Frequency (in minutes)

Email Batch Size

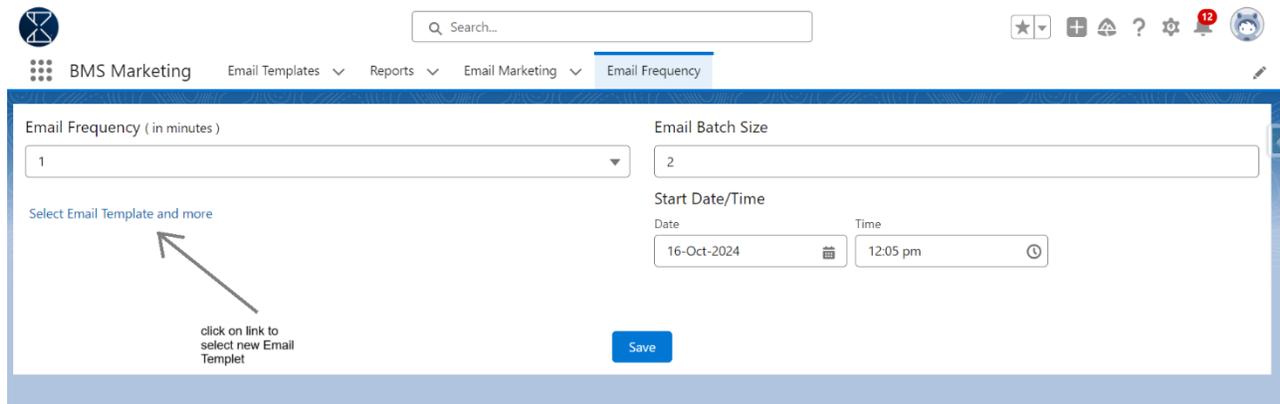
Select Email Template and more

Start Date/Time

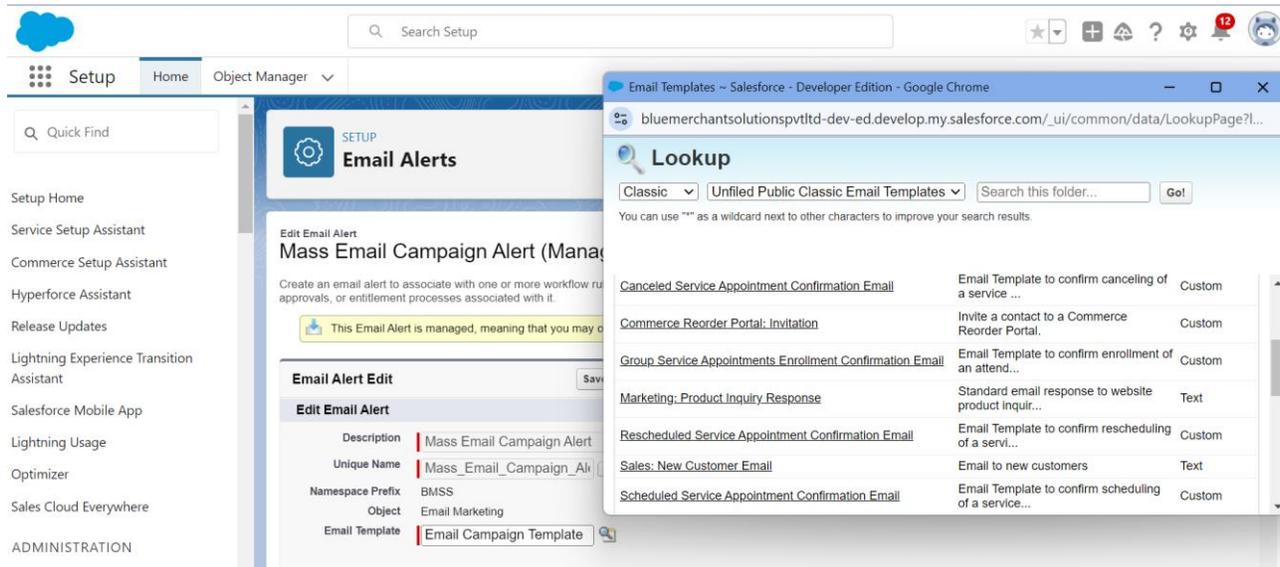
Date	Time
<input type="text" value="07-Oct-2024"/> 📅	<input type="text" value="12:42 pm"/> ⌚

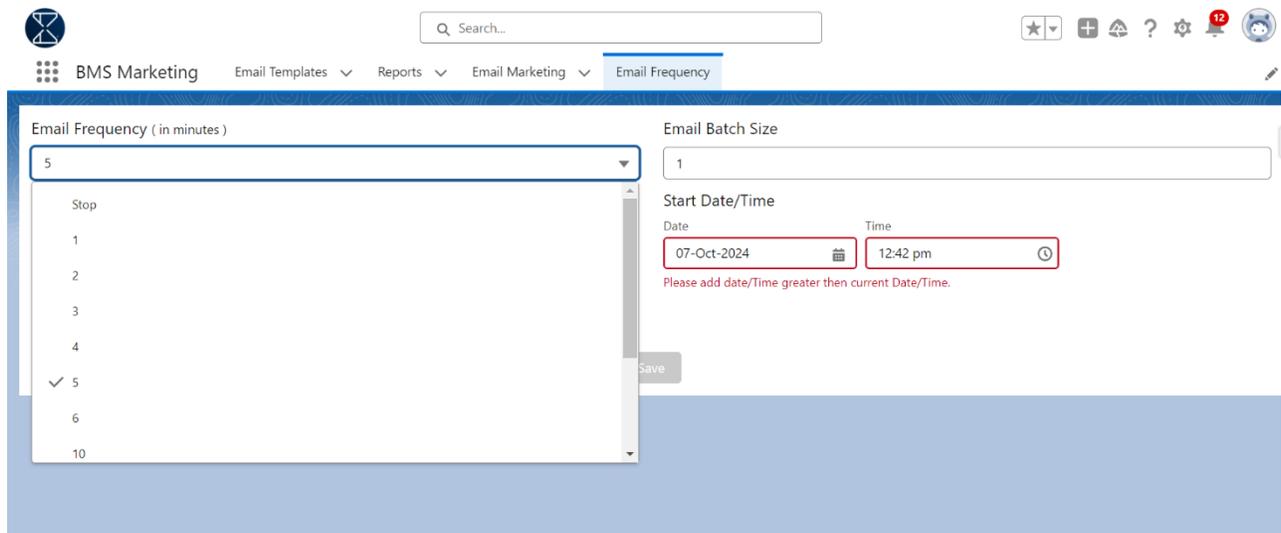
Please add date/Time greater then current Date/Time.

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.



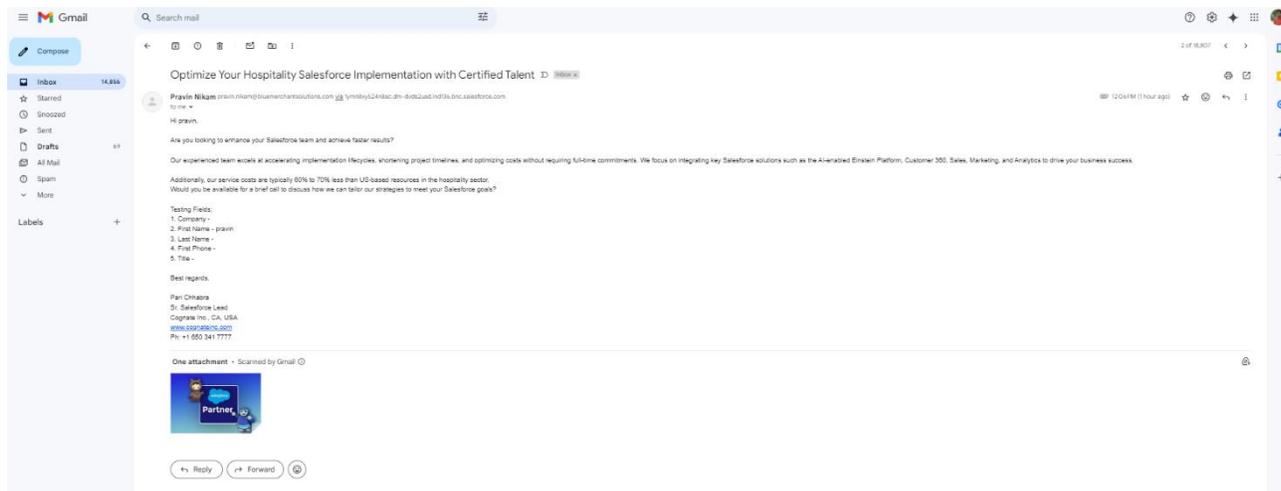


Select Email frequency in minutes, Email batch size and start date/time at which time you want to scheduled batch and save record.

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**

Blue Merchant Solutions

Address : Sector 27, Noida, Uttar Pradesh, India

Phone : [+91 9810895082](tel:+919810895082),

Email : [support@bluemerchantsolutions.com](mailto:support@bluemerchantsolutions.com).