Installation and Configuration

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Installing and Configuring the Email Scheduler Service

Before you use the Email Scheduler App, you must install it in your Org. and configure the associated resources. This section walks you through the installation and configuration process.

Install the Email Scheduler Application

This page explains how to get the Salesforce.com Email Scheduler Application from the AppExchange and install it in your production or sandbox Org.

- 1. Use the link ;
- 2. If you are not already logged in, log in to the AppExchange using the credentials for the org where the app will be installed. First, you should test on a sandbox org.
- 3. Take a look at the pakage installation détails and click on **Continue**.

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Quick Find Q	Package Installation Detail	S							Help for this Page 🥑
	Package Name	EmailSchedulerService							
Force.com Home	Version Name	Beta 140318.1							
	Version Number	1.0 (Beta 2)							
System Overview	Publisher	Freelance							
Personal Setup	Description								
My Personal Information				Continue	Cancel				
Email	Package Components								
 Import 	Fackage components								
 Desktop Integration 	▼ Code (7)								

- 4. In Step 1: Approve Package API Access, the installer lists the permissions required by the Email Scheduler App. Review the page and approve the required access by clicking **Next**.
- 5. In Step 2: Choose Security Level, you can define which user profiles can access the app. Select your appropriate access level and click **Next**.
- 6. In setp 3 : Click Install to start installation.
- Installation may take several seconds. If you don't see the Install Complete page, go to Setup > Installed Packages

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Force.com Home	Install Complete							
System Overview	Follow any remaining steps in the app install guide to complete deployment.							
-,	Installed Package Detail	Uninst	all View Components	View Dependencies				
Personal Setup	Package Name	EmailSchedulerService			Version Number	1.0 (Beta 2)		
My Personal Information	Language	English			Package Type	Managed		
Email	Version Name	Beta 140318.1			API Access	Unrestricted [Enable Restrictions]		
 Import 	Namespace Prefix	ESS			Modified By	Vincent CHARLET, 19/03/2014 09:54		
 Desktop Integration 	Publisher	Freelance						
My Chatter Settings	Description	Allow you to schedule an email campaign						
Work.com New!	Installed By	Vincent CHARLET, 19/03/2014 09:54						

Configure the Email Scheduler App : Schedule the Apex

The first step is to scheduler the Apex code that check every day if there something to do

- 1. From Setup, click **Develop > Apex Classes**
- 2. Click the Schedule Apex button

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Quick Find Q Expand All Collapse All	Apex Classes Rep O										
Force.com Home	Force.com Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Force.com platform.										
System Overview	Percent of Apex Used: 0% You are currently using 0 characters of Apex Code (excluding comments and @is1est annotated diasses) in your organization, out of an allowed limit of 3 000 000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.										
Personal Setup My Personal Information Email Information	Estimate your orsanization's code coverage () Completal classes (1) Wenc: AE Contail New View A (B (C (D (E (F (G (N (I (J (C ((N (C										
Desktop Integration Mu Chatter Fettings		Developer	Console New Ge	enerate from WSDL	Run All Tests Schedule Apex						
Work.com New!	Action Name +	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Override Log Filters				
	Edit 📥 EmailSchedulerLimit TEST	ESS	29,0	Active	1 273	Vincent CHARLET, 19/03/2014 09:54					
App Setup	Edit EmailScheduler TEST	ESS	29,0	Active	3 465	Vincent CHARLET, 19/03/2014 09:54					
Customize	Edit Security 📥 EmailTemplatePicklistControler	ESS	29,0	Active	1 189	Vincent CHARLET, 19/03/2014 09:54					
Create	Edit 📥 EmailTemplatePicklistControler_TEST	ESS	29,0	Active	382	Vincent CHARLET, 19/03/2014 09:54					
Develop	Edit 👌 OrganizationUtils	ESS	29,0	Active	553	Vincent CHARLET, 19/03/2014 09:54					
Apex Classes	Edit Security 📥 schedulableSendEmail	ESS	29,0	Active	2 337	Vincent CHARLET, 19/03/2014 09:54					
Apex Trippers											

- 3. On the Schedule apex page, enter the following :
 - Job Name : the job name you want
 - Apex Class: schedulableSendEmail
 - Schedule Apex Execution :
 - ✓Frequency:Weekly
 - ✓ Recurs every week on : check each day, Monday, Tuesday, ...
 - ✓ Start : Today
 - ✓ End : after one month or one year, whatever but beware to reconfigure the scheduled apex after the end
 - ✓ Preferred Start Time : this is very important to configure the time at the end of the day (best is 22 :00) because the application will burn your email quota.

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Schedule Apex										Help for this Page 🥹
Expand All Collapse All Force.com Home	Expand AII Collapse AI schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.									
System Overview		Save	Cancel							
Personal Setup	Job Name Apex Class	Scheduled Email schedulableSendEmail								
My Personal Information Email Import Desktop Integration My Chatter Settings Work.com New!	Schedule Apex Execution	Frequency	 Weekly Monthly 	Recurs every week on Sunday Monday Tuesday						
App Setup Customize Create Covering Create Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Covering Cove				 ✓ Wednesday ✓ Thursday ✓ Friday ✓ Saturday 						
Apex Triggers Apex Triggers Apex Triggers Aper Tel Recotton API Costom Settings Email Services Pages Silles		Start End Preferred Start Time	19/03/2014 19/04/2014 22:00 •	[<u>19/03/2014</u>] [<u>19/03/2014</u>] will depend on job queue a	activity.					
Static Resources Tools		Save	Cancel							



Note : if you don't see the schedulableSendEmail class via the search button or if you have an error that the class must implements the schedulable interface, go back to the **Develop > Apex Class**, select the class and **Edit**. it's blank but it's normal as it's a managed class.

Go back to the schedule apex page and schedulableSendEmail class appears

Configure Layout : Campaign

In order to use the email Scheduler App, you must add the EmailSchedulers related list to your campagn layout

- 1. From Setup, click **Customize > Campaign > Page Layout**
- 2. Edit the campaign page layout
- 3. On the campaign layout, select related lists and drag drop the EmailSchedulers fields
- 4. Configure the related list field by select for example EmailTemplate Name and Status

	Related List Properties - EmailSchedulers ×	
Related Lists	Columns California Constraints of the selected fields California Constraints of the selected fields Carated by Alas Carated by Alas Last Modified By Alas Last Modified Date Name	nities Responses Num Sent Expected Revenue Budgeted Cost Actual Cost 89 644 33 044 123.45 € 123.45 € 123.45 €
Copen Activities Subject Name Sample Subject Sample Name	Sort By:W @ Ascending © Descending	Priority Assigned To Sample Priority Sarah Sample
Activity History Subject Name	Buttons OK Cancel Revert to Defaults	To Last Modified Date/Time

5. Optional : Add the EmailSchedulerInProgress field that indicate if an email is scheduled for this campaign

Configure layout : Campaign member

Optional : you can use the EmailSend field on campaign member indicate the email scheduler service has done with this member

Managing Email Scheduler

Schedule a new email campaign

- 1. Start a new campaign and add campaign member as usual
- 2. Click New EmailScheduler above the EmailSchedulers related list

 EmailSchedulers
 Item EmailScheduler

 No records to display
 Item EmailScheduler
- 3. On the emailScheduler page, enter the following :
 - ✓ Campaign : the campaign you want to schedule
 - ✓ Reset : for the first scheduling email it doesn't care, for the next scheduled on the same campaign it allow you to re-send to the member or not
 - ✓ Email template : the template email you want to use. Note that you can filter the list by select the template email folder

New EmailScheduler		Save Cancel	
▼ EmailScheduler Information			
Campaign	Test Scheduler 🕙		
Reset			
Folder	CHARLET -		
Email Template	Contact Follow Up (SAMPLE)	•	
		Save Cancel	
Reset Folder Email Template	CHARLET Contact Follow Up (SAMPLE)	Save Cancel	

4. Click Save. You've done, the emailing start at the time you configure the scheduled apex