

Email Scheduler Service

Installation and Configuration

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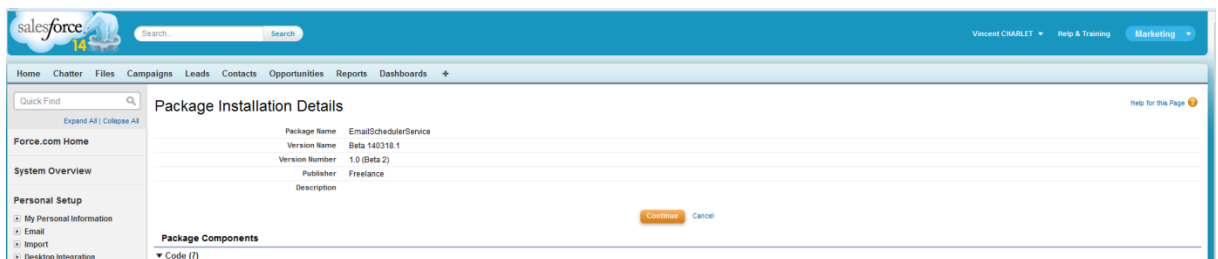
Installing and Configuring the Email Scheduler Service

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.

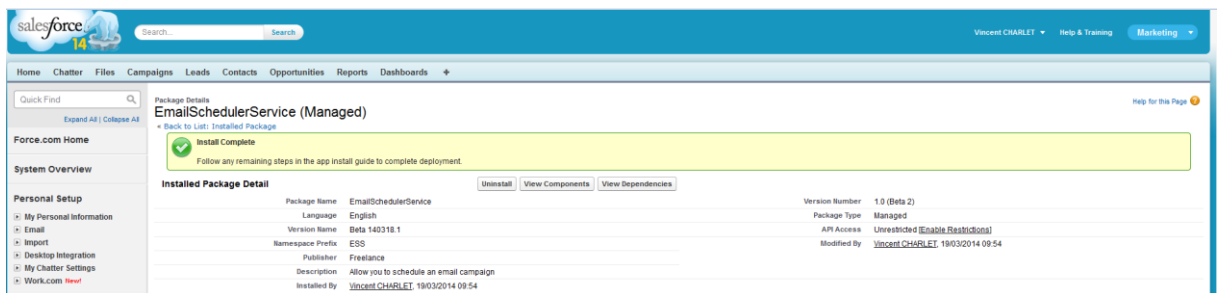
Install the Email Scheduler Application

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 package installation details and click on **Continue**.



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 step 3 : Click **Install** to start installation.
7. Installation may take several seconds. If you don't see the Install Complete page, go to **Setup > Installed Packages**



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

Apex Classes

Force.com Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Force.com platform.

Percent of Apex Used: 0%
You are currently using 0 characters of Apex Code (excluding comments and @isTest annotated classes) 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.

Estimate your organization's code coverage

Compile All Classes

View: All Create New View

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	
Edit	EmailScheduler_TEST	ESS	29.0	Active	3 465	Vincent CHARLET 19/03/2014 09:54	
Edit Security	EmailTemplatePicklistController	ESS	29.0	Active	1 189	Vincent CHARLET 19/03/2014 09:54	
Edit	EmailTemplatePicklistController_TEST	ESS	29.0	Active	382	Vincent CHARLET 19/03/2014 09:54	
Edit	OrganizationMisc	ESS	29.0	Active	553	Vincent CHARLET 19/03/2014 09:54	
Edit Security	SchedulableSendEmail	ESS	29.0	Active	2 337	Vincent CHARLET 19/03/2014 09:54	

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.

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name: Scheduled Email

Apex Class: SchedulableSendEmail

Schedule Apex Execution

Frequency: Weekly Monthly

Recurs every week on:

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Start: 19/03/2014 (19/03/2014)

End: 19/04/2014 (19/03/2014)

Preferred Start Time: 22:00

Exact start time will depend on job queue activity

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.

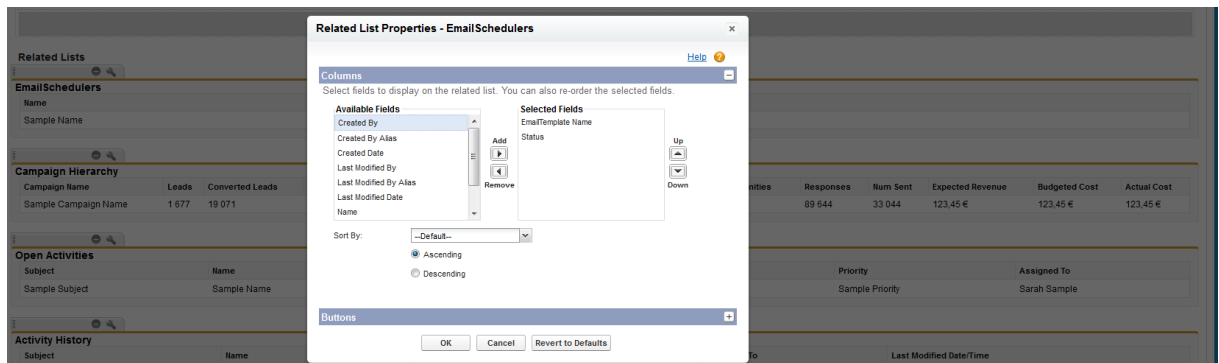


Go back to the schedule apex page and `schedulableSendEmail` class appears

Configure Layout : Campaign

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



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

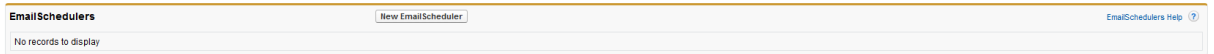
Configure layout : Campaign member

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

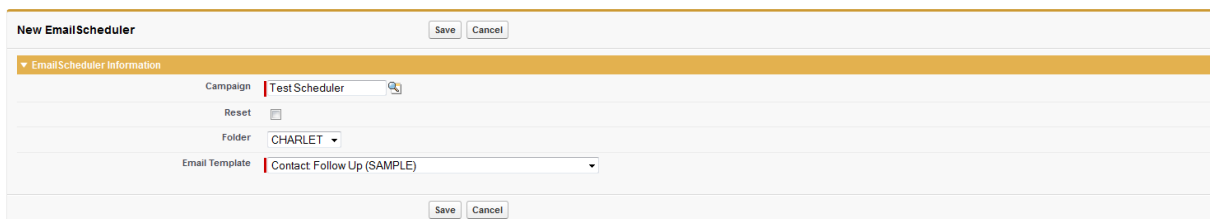
Managing Email Scheduler

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



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



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