8/16/13

How To Create an Email Notification

(For Contact Memberships ending in 30 days)

Situation: You've properly implemented the SalesForce Nonprofit Start Pack's native Membership capabilities (if not, see "Setting Up Membership for the SalesForce NPSP") and would like to notify members via an email when their Membership is ending soon.

Step 1: Create an Email Template

1. Click **your name** in the top right-hand corner→ then click **Setup**.
2. Along the left-hand column, go to Administration Setup and click **Communication Templates**.
3. In the main content section, click **Create or Update Email Templates**. OR, click **Email Templates** in the left-hand column.
4. Click "**New Template**"
5. Choose Text and Click "**Next**".
6. If this is your one and only email template, you can leave the **Folder** field to the preset **Unfiled Public Email Templates**.

Note: If you plan to create many related email templates, consider creating an **Email Template Folder** (instructions for which you can find in the **bonus section**).

7. Fill out the Email Template Information
    a. Check the box titled **Available for Use**.
    b. In the **Email Template Name field**, use something obvious like "**Contact Membership End Email Template**."

c. In the **Description** field, use something equally as obvious, like “**Email template to notify Contact of Membership ending soon.**”

d. In the **Subject** field, choose a relevant subject line for the Email, such as “**Your membership is ending soon!**”

8. Create the Email Message and Include Merged Fields

a. In the **Email Body** field, type your email content, using the **Available Merge Fields** section to copy and paste relevant field information from the Contact record.

b. To create a Merge Field
   i. Scroll to the top of the page where it says “Available Merge Fields”
   ii. Choose a field under **Selected Field Type** (eg, **“Contact Fields”)**
   iii. Choose **Selected Field** (eg, “Name”)
   iv. The Merged Field will automatically appear under **Copy Merge Field Value** (eg, {!Contact.Name},)

c. Copy and paste the merge field into the body of the email as needed.

d. Repeat process for each merged field.

Example of a complete email merged message:

Dear {!Contact.Name},

Oh no! Your membership is ending soon (on {!Contact.npo02__MembershipEndDate__c})! Please strongly consider renewing your membership so we can continue being friends!

To refresh your memory, your last membership level was {!Contact.npo02__LastMembershipLevel__c}. Upgrade for even more perks like free snacks!

Warm Regards,

SalesForce

9. Click **SAVE**.

Note: It is highly recommended to test the auto-email with a test Contact record before making live.

Step 2: Create a Workflow Rule

1. Click **your name** in the top right-hand corner→ then click **Setup**.
2. Along the left-hand column, click **Create→ Workflows and Approvals→Workflow Rules**
3. Click "**New Rule**".
4. In the **Object** field, select **Contact**, then click "**Next**".
5. Create a **Rule Name** that is specific and obvious, such as "**Membership End Workflow**".
6. Fill in a **Description**, such as "**Will notify a Contact of an approaching Membership End Date**".
7. Under **Evaluate the rule when a Record is:** select the option titled "**created, and any time it's edited to subsequently meet criteria**".
8. Under **Rule Criteria→Field**, select "**Contact: Membership End Date**"
9. In the **Operator** field, select "**Not equal to**".
10. Leave the **Value** field blank.
11. Click "**Save and Next**".
12. Under the **Time-Dependent Workflow Actions** section, click A**dd Time Trigger**.
13. In the field that reads "**After**", change the value to "**Before**".
14. In the final field, set the value to "**Contact: Membership End Date**".
15. Click "**Save**".
16. In the **Time-Dependent** Section, click **Add Workflow Action→ New Email Alert**
17. In the Description field, type something like "**Membership End Email Alert**".
18. Click the Lookup box next to the **Email Template** field and search for and select your recently created email template (**Contact Membership End Email Template**).

19. Under the **Recipient Type→Search** field, select "**Email Field**".

20. From **Available Recipients** list, Select "**Email Field: Email**" and click "Add" (right arrow) to move over to **Selected Recipients** list

21. Double-check your work.

22. Click "**Save**".

23. Click "Done"

24. Click "**Activate**".

25. Do a little happy dance, you're done!

Bonus Section: Create an Email Template Folder

1. Click **your name** in the top right-hand corner→ then click **Setup**.

2. Along the left-hand column, under **Administration Setup**, click **Communication Templates**.

3. In the main content section, click **Create or Update Email Templates**. OR, click **Email Templates** in the left-hand column.

4. In the **Folder** line, click "**Create New Folder**".

5. In the **Email Template Folder Label** field, create a name for your new folder.

6. Set the **Public Folder Access** to your specifications.

7. If you have already created reports relevant to this folder, you may select them from the **Unfiled Public Email Templates** section.

8. If applicable, change the **Folder Accessibility Options**.

9. Click "**Save**".

10. Great work! You're done!