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# Sales Emails and Alerts Implementation Guide

Salesforce, Summer '23





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# BEFORE YOU BEGIN

Before you set up Sales Emails and Alerts, learn about API requirements and other considerations.

## [Considerations for Setting Up Sales Emails and Alerts](#)

Before you set up Sales Emails and Alerts, review considerations.

## [API Permissions for Sales Emails and Alerts](#)

Sales Emails and Alerts requires some API permissions to function correctly. Assign a Salesforce Engage permission set and license to a user to grant these required permissions.

## Considerations for Setting Up Sales Emails and Alerts

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Before you set up Sales Emails and Alerts, review considerations.

- Before you can set up Sales Emails and Alerts, you must have a verified Salesforce connector. For more information, see [Connecting Account Engagement and Salesforce](#).
- Sales Emails and Alerts isn't supported for Salesforce sandboxes.
- Don't add legacy Custom Permissions for Account Engagement to your Salesforce profiles.
- To load all user variable tags when using Send on Behalf Of, create Account Engagement users for all account, lead, and contact owners that are used in a from address. Then link them to their CRM username.

## API Permissions for Sales Emails and Alerts

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Sales Emails and Alerts requires some API permissions to function correctly. Assign a Salesforce Engage permission set and license to a user to grant these required permissions.

-  **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.
- Prospects—Create, query, and read prospects that aren't assigned to them. If a user has read permission on a lead or contact in Salesforce, the user can perform actions on a corresponding prospect matched by:
  - Lead or contact ID if your business unit allows multiple prospects with the same email address.
  - Email if your business unit doesn't allow multiple prospects with the same email address.
- Email templates—View all templates marked for one-to-one emails (respects folder permissions).
- Lists—View and edit all (respects folder permissions).
- Drip Programs—View all (respects folder permissions). Drip Program names are displayed as list names in the Salesforce mobile app and Engage for Gmail.

# SET UP SALES EMAILS AND ALERTS

To complete setup for Sales Emails and Alerts, you need a Salesforce admin and an Account Engagement admin.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

## [Linking Sales Emails and Alerts Users to Account Engagement](#)

To access Sales Emails and Alerts features in Salesforce, users must be linked to an Account Engagement user.

## [Assign Licenses and Permission Sets for Sales Emails and Alerts](#)

You can assign and unassign licenses and permission sets in bulk to your users who have Sales Cloud, Service Cloud, or CRM licenses.

## [Let Users Add Salesforce Files to Emails](#)

Enable Content Deliveries and Public Links to let your users upload and select Salesforce files from the Sales Emails and Alerts editor.

## [Configure Lead, Contact, and Account Pages](#)

Configure page layouts so your users can send Sales Emails and Alerts emails and add leads and contacts to Account Engagement lists from the record pages.

## [Configure Settings for Sales Emails and Alerts](#)

Configure Sales Emails and Alerts sending limits, set a default template, and choose a user to receive email notifications. You can also choose whether to respect a prospect's opted-out status for one-to-one emails.

## [Enable the Engage Sales Tools Page](#)

The Engage Sales Tools Visualforce page gives users access to more resources for Sales Emails And Alerts.

## [Team Reports for Sales Emails and Alerts](#)

Sales managers, marketers, and admins can report on team usage and impact of Sales Emails and Alerts activity. View aggregated stats on emails that were sent via campaigns for Sales Emails and Alerts, Engage for Gmail, or Engage for Outlook. Drill in and compare stats for individual sales reps, and identify the top-performing templates by email opens and clicks.

## EDITIONS

Available in: All Account Engagement Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions.

## Linking Sales Emails and Alerts Users to Account Engagement

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To access Sales Emails and Alerts features in Salesforce, users must be linked to an Account Engagement user.

You can link users in a few ways.

- Enable Salesforce User Sync. See [Manage Users with Salesforce User Sync](#).
- Map existing users individually. See [Map Salesforce and Account Engagement Usernames](#).
- Create and map users individually. See [Create Account Engagement Users](#). To keep Sales Emails and Alerts users from logging in directly to Account Engagement, deselect **Send Activation Email**.
- Import and map users in bulk. Export the users you want to link from Salesforce, and keep only the First Name, Last Name, Username, and Email columns. Add a Role column, and choose user roles for each user. Import the users in Account Engagement and enable single sign-on (SSO). For instructions, see [Import Users](#).

## Assign Licenses and Permission Sets for Sales Emails and Alerts

You can assign and unassign licenses and permission sets in bulk to your users who have Sales Cloud, Service Cloud, or CRM licenses.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

When you assign the Salesforce Engage license and permission set, the required API permissions are automatically granted. See [API Permissions for Sales Emails and Alerts](#)

1. Navigate to the **Salesforce Engage License Assignment** tab.

 **Note:** If you don't see this tab, on the profile assigned to your admins, change the tab's setting to **Default On**.

2. From the Action Type dropdown, select **Assign**.

3. Select which users you want to assign Salesforce Engage permission sets and licenses, and click **Add License**.

### USER PERMISSIONS

To assign permission set licenses:

- Manage Users

## Let Users Add Salesforce Files to Emails

Enable Content Deliveries and Public Links to let your users upload and select Salesforce files from the Sales Emails and Alerts editor.

## Configure Lead, Contact, and Account Pages

Configure page layouts so your users can send Sales Emails and Alerts emails and add leads and contacts to Account Engagement lists from the record pages.

### [Use the Add to Nurture Action in Page Layouts](#)


With the Add to Nurture action, Sales Emails and Alerts users can add leads and contacts to marketing lists from lead, contact, and person account records.

### [Add Send Engage Email Button](#)

With campaigns in Sales Emails and Alerts (Engage Campaigns), users can send emails to leads, contacts, and campaign members. To use this feature, add the Send Engage Email button to your lead, contact, opportunity, and account search layouts and detail pages. You can also add the button to your campaign detail pages.

## Use the Add to Nurture Action in Page Layouts

With the Add to Nurture action, Sales Emails and Alerts users can add leads and contacts to marketing lists from lead, contact, and person account records.

 **Note:** The Add to Nurture action isn't the preferred way to give reps the ability to add to marketing lists from Salesforce. We recommend using the Add to Engagement Studio Lists action in Salesforce for an easier experience for reps.

1. Open the page layout you want to add the action to. See [Create and Edit Page Layouts](#).

2. From the Quick Actions section, drag **Add to Nurture List** to the Quick Actions in the Salesforce Classic Publisher section.

3. Save the page layout.

### USER PERMISSIONS

To customize page layouts:

- Customize Application

## Add Send Engage Email Button

With campaigns in Sales Emails and Alerts (Engage Campaigns), users can send emails to leads, contacts, and campaign members. To use this feature, add the Send Engage Email button to your lead, contact, opportunity, and account search layouts and detail pages. You can also add the button to your campaign detail pages.

### Note:

- Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.
- Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

 **Note:** If the Send Pardot Email button is on your page layout, remove it before adding the Send Engage Email button.

1. Add the Send Engage Email button to the lead, contact, campaign, opportunity, and account search layouts and detail pages. See [Create and Edit Page Layouts](#) . To add the button to Lightning Experience, drag it to the Salesforce Mobile and Lightning Experience Actions section.
2. Add the Send Engage Email button to the contacts related list on an account page layout.
  - a. Edit the account page layout assigned to Sales Emails and Alerts users.
  - b. Select **Related Lists**, and click the wrench icon in the Contacts section.
  - c. Expand the Buttons section.
  - d. From the Available Buttons list, click **Send Engage Emails**, and then click **Add**.

### USER PERMISSIONS

To customize page layouts:

- [Customize Application](#)

## Configure Settings for Sales Emails and Alerts

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Configure Sales Emails and Alerts sending limits, set a default template, and choose a user to receive email notifications. You can also choose whether to respect a prospect's opted-out status for one-to-one emails.

### [Configure Product and Service Notifications for Sales Emails and Alerts](#)

Choose a user to receive important notifications about Sales Emails and Alerts.

### [Edit Email Limits and Options](#)

In your Account Engagement settings for Sales Emails and Alerts, an admin can set a campaign send limit, exclude opted out prospects from emails, turn off tracking for Gmail, and set a default template to use with these campaigns. These settings apply to all Sales and Email Alerts users in your business unit.

### [Exclude Opted-Out Prospects from 1:1 Emails](#)


An Account Engagement admin can control whether users can send one-to-one emails to opted-out prospects from Sales Emails and Alerts.



## Configure Product and Service Notifications for Sales Emails and Alerts

Choose a user to receive important notifications about Sales Emails and Alerts.

Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

1. Open the settings for your business unit.
  - In Account Engagement, click  and then select **Settings**.
  - In the Lightning app, select **Account Engagement Settings**.
2. Scroll to the Product and Services Notification section.
3. Next to Salesforce Engage, select a user from the dropdown.
4. Save your changes.

### USER PERMISSIONS


To edit notification settings:

- Account Engagement Administrator role

## Edit Email Limits and Options

In your Account Engagement settings for Sales Emails and Alerts, an admin can set a campaign send limit, exclude opted out prospects from emails, turn off tracking for Gmail, and set a default template to use with these campaigns. These settings apply to all Sales and Email Alerts users in your business unit.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

1. Open the settings for your business unit.
  - In Account Engagement, click  and then select **Settings**.
  - In the Lightning app, select **Account Engagement Settings**.
2. Click **Salesforce Engage**.
3. Configure the Engage Campaign Limit and Email Options settings.

### EDITIONS

All editions with Sales Emails and Alerts

### USER PERMISSIONS

To change the send limit:

- Account Engagement Administrator role


Setting	Description
Engage Campaign Limit	Limits the number of Engage Campaign emails an Engage user can send over a 24-hour period. Choose a number between 0 and 500. 24-hour rollovers respect the user's timezone.
Exclude opted out prospects from 1:1 Engage emails sent from Salesforce	Prevents users from sending 1:1 emails to prospects who opted out of marketing emails.
Prevent Engage for Gmail from tracking opens and clicks	Turns off Engage for Gmail's tracking functionality.

4. Save your changes.

## Exclude Opted-Out Prospects from 1:1 Emails

An Account Engagement admin can control whether users can send one-to-one emails to opted-out prospects from Sales Emails and Alerts.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

1. Open the settings for your business unit.
  - In Account Engagement, click  and then select **Settings**.
  - In the Lightning app, select **Account Engagement Settings**.
2. Expand **Salesforce Engage**.
3. Select **Exclude opted-out prospects from 1:1 Engage emails sent from Salesforce**.
4. Save your work.


### USER PERMISSIONS

To edit Salesforce Engage settings:

- Account Engagement Administrator role

## Enable the Engage Sales Tools Page

The Engage Sales Tools Visualforce page gives users access to more resources for Sales Emails And Alerts.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

The page includes a few resources for users.


- Engage Alerts Desktop download links for macOS and Windows
- Engage for Gmail download link
- Link to Sales Emails and Alerts documentation
- Links to Sales Emails and Alerts training materials

Salesforce admins can decide how to make this page available to users. A few options include:

- Tab in the Sales Emails and Alerts app
- Link in the sidebar
- Button within Engage Campaigns

## Team Reports for Sales Emails and Alerts

Sales managers, marketers, and admins can report on team usage and impact of Sales Emails and Alerts activity. View aggregated stats on emails that were sent via campaigns for Sales Emails and Alerts, Engage for Gmail, or Engage for Outlook. Drill in and compare stats for individual sales reps, and identify the top-performing templates by email opens and clicks.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

### [Considerations for Using Team Reports](#)

When using Engage Team Reports, keep these considerations in mind.

### [Set Up Team Reports](#)

Install and configure Team Reports for Sales Emails and Alerts to make them available to your users.

## Considerations for Using Team Reports

When using Engage Team Reports, keep these considerations in mind.

- ✔ **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.
- Your [user role hierarchy](#) in Salesforce determines what the My Team's Engage Sends filter shows. If your admin has changed sharing settings of custom objects in the team reports package, this filter doesn't work as expected.
- Editing or deleting reports in the Engage Reports folder breaks team reports. To customize a report, make a copy.
- You don't need an Engage license to work with team reports.
- The Send Engage Email button works only for users with an Engage license.
- Reports data created from the team reports objects counts toward your data storage limits in Salesforce.
- The custom objects created in the team reports package don't count toward your custom object limits for your Salesforce edition.
- The Engage Reports folder is set to private by default.
- We recommend that you assign the connector user the View Setup and Configuration permission. This permission makes it easier for our support team to troubleshoot issues.
- Template data includes only stats from Engage Sends. It doesn't include data from other emails, such as list emails and engagement programs.
- For email unsubscribes and opt-outs, team reports show the total number of times a prospect clicked unsubscribe or opt-out. This number can differ from Email Template Reports, which show a maximum of one unsubscribe or opt-out per prospect.

## Set Up Team Reports

Install and configure Team Reports for Sales Emails and Alerts to make them available to your users.

- ✔ **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

1. Install the Engage Reports package.
  - a. [Download the Engage Reports package](#).
  - b. Click **Install for Admins Only**, and click **Install**.
  - c. When the package is finished installing, click **Done**.
2. Assign permissions sets. See [Permission Sets](#) if you need help with this step.
  - Assign the Engage Reports (Connector User) permission set to your connector user. Customers with the Salesforce Connector v2 can skip this step, because it's assigned by default.
  - Assign the Engage Reports (End User) permission set to all users that view and run Sales Emails and Alerts reports and all users that send campaigns with Sales Emails and Alerts.
  - a. Navigate to the Engage Reports Permissions tab.
  - b. Set the view to **Unassigned Users**.
  - c. Assign permissions as needed.
3. Share the Engage Reports folder with any admins that need access to the reports.
  - a. Navigate to Reports, and find Engage Reports.
  - b. Hover over **Engage Reports**, and click the pin icon.

### USER PERMISSIONS

To install packages:

- [Download AppExchange Packages](#)

To assign permission sets:

- [Assign Permission Sets](#)


To share report folders:

- [Manage Reports in Public Folders](#)



# SET UP OPTIONAL FEATURES

Now that you've set up Sales Emails and Alerts, consider giving your users access to Sales Emails and Alerts for Gmail or Outlook, and grant access to delegated sending.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

## [Assign Send on Behalf of Permissions](#)

To delegate sending for campaigns in Sales Emails and Alerts, assign the appropriate permissions.

### [Engage for Gmail](#)

Engage for Gmail is a Chrome extension that lets Sales Emails and Alerts users send trackable emails directly from Gmail.

### [Engage for Outlook](#)

Engage for Outlook lets Sales Emails and Alerts users work from their inbox and track opens and sends on emails sent through Outlook.

## Assign Send on Behalf of Permissions

To delegate sending for campaigns in Sales Emails and Alerts, assign the appropriate permissions.

- For the users who need access, enable the necessary permissions on their related profile.
  - Send on Behalf of Another User in Engage Campaigns using Account Teams—Assign this permission to let users send as the contact or account owner when they're a member of the same account team.
  - Send on Behalf of Another User in Engage Campaigns—Assign this permission to let users send as the lead, contact, or account owner when they have write access to the lead, contact, or account they're emailing.


### USER PERMISSIONS

To enable custom permissions in profiles:

- [Manage Profiles and Permission Sets](#)

## Engage for Gmail

Engage for Gmail is a Chrome extension that lets Sales Emails and Alerts users send trackable emails directly from Gmail.

 **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

### [Considerations for Using Engage for Gmail](#)

When using Engage for Gmail, keep these considerations in mind.

### [Install the Engage for Gmail Extension](#)


Install the Engage for Gmail Chrome extension to send emails from Sales Emails and Alerts.

### [Send an Email with Engage for Gmail](#)

Send tracked emails from Gmail with the Engage for Gmail extension.

## Considerations for Using Engage for Gmail

When using Engage for Gmail, keep these considerations in mind.

-  **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

### General

- To use Engage for Gmail, the Salesforce user's profile must have the API Enabled permission.
- Your Engage for Gmail session lasts as long your Salesforce session is set to persist in your Salesforce org's settings.

### Sending Emails

- Emails sent with Engage for Gmail are sent through Google's email servers.
- When you send a Sales Emails and Alerts email to a recipient that isn't an existing lead or contact in Salesforce, you're prompted to create a lead or contact. The new record is synced to Account Engagement and creates a prospect.
- If a prospect is archived, you can't send the prospect an Engage for Gmail message, and the prospect's marketing actions aren't displayed.
- You can send to only one recipient at a time.
- You can't select a template until you enter the recipient's email address.

### Tracking and Logging Emails

- If the Sync plug-in email setting is enabled on your connector, emails are logged to the lead or contact activity history with "Engage Gmail Email" prepended to the subject.
- If you have multiple prospects with the same email address, the extension prompts you to select which Salesforce record to track the email on.
- Engage for Gmail overwrites all pasted links with a tracked link URL and inserts an open tracker into the email body content.
- Email opens and clicks are tracked in Account Engagement.
- The Email Plug-in Campaign dropdown in Account Engagement Settings defines the campaign for your Engage for Gmail email sends. To avoid errors, don't archive the Email Plug-in Campaign.

### Google and Chrome Extension Compatibility

- If you use other Gmail extensions, minimize them to use the Engage for Gmail side panel.
- The Engage for Gmail side panel isn't compatible with Gmail Lab features or some other Chrome extensions.
- Engage for Gmail is updated for Google's Scheduled Release track. If you're on Google's Rapid Release track, it's possible to experience issues until the extension is updated in line with the Standard Release track.
- If you want to use your Gmail signature with Engage email templates, in Chrome, navigate to **Extensions > Engage for Gmail > Options**. Select **Preserve Gmail Signature**.


### Using Variable Tags and Merge Fields

- Engage for Gmail doesn't support View Online variable tags or merge fields.
- Prospect variable tags and merge fields populate in the email, but account variable tags and merge fields don't.

- Prospect variable tags and merge fields must be included in the template. You can't add variable tags or merge fields directly in Gmail.

## Install the Engage for Gmail Extension

Install the Engage for Gmail Chrome extension to send emails from Sales Emails and Alerts.

-  **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.

To use Engage for Gmail, you must have a Salesforce Engage license, and the Salesforce user must be linked to an Account Engagement user.

1. On the Engage Sales Tool tab in Salesforce, click **Engage for Gmail**. Contact your admin if you don't have this tab.
2. To open Chrome's extension manager, go to `chrome://extensions`.
3. Locate the Engage extension, and click **Options**.
4. Click **Log in With Salesforce**.
5. If prompted, enter your Salesforce credentials.
6. Click **Allow**.

## Send an Email with Engage for Gmail

Send tracked emails from Gmail with the Engage for Gmail extension.

1. In Gmail, compose an email.
2. Click the cloud icon in the compose menu.
3. Select **Track clicks and opens**.
4. (Optional) If you have multiple prospects with the same email address, select **use default email selection for this record**. This option tracks the email on the record that was previously selected.
5. In the To field, enter a lead or contact email address.
6. To use an email template, select **Use a Template**, and select a template.
7. When finished, send your email.

After you send a tracked email, you can view information about thread participants in the Engage for Gmail side panel. When you open the email thread, the side panel opens on-screen.

## Engage for Outlook

Engage for Outlook lets Sales Emails and Alerts users work from their inbox and track opens and sends on emails sent through Outlook.

To use Engage for Outlook, the Outlook integration must be enabled in your org, but it's supported for users on Salesforce Classic and Lightning Experience.

### [Considerations for Using Engage for Outlook](#)

When using Engage for Outlook, keep these considerations in mind.

### EDITIONS


Available in: All Account Engagement Editions and Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Sales Emails and Alerts

### Set Up Engage for Outlook

To send and track emails from Outlook, set up Engage for Outlook.


## Considerations for Using Engage for Outlook

When using Engage for Outlook, keep these considerations in mind.

-  **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.
- Users need an Engage license to use Engage for Outlook.
- Engage for Outlook has the same [system requirements as Outlook integration](#).
- If multiple recipients are copied on the same email, all email opens are attributed to the first recipient in the To field. The user can change who open tracking is associated with by selecting a different record in the People component.
- Engage for Outlook uses Salesforce email templates. Classic templates from Account Engagement are unavailable.
- For more accurate tracking on one-to-many emails, [send a campaign to multiple leads or contacts](#) from Salesforce instead.
- To prevent tracking false email opens, Engage for Outlook doesn't track opens on the sending user's IP address. If you send a test email and want to track the open, access it on a different network than it was sent from.
- When you send an email to an archived prospect with Engage for Outlook, the prospect isn't unarchived, and the email activity isn't tracked.
- Email attachments aren't tracked. To track a file, add a link to a hosted Account Engagement file instead.
- Emails sent with tracking are logged to the activity history or timeline on the associated Salesforce records.

## Set Up Engage for Outlook

To send and track emails from Outlook, set up Engage for Outlook.

-  **Note:** Salesforce Engage is now known as Sales Emails and Alerts. You can expect to see the previous name in a few places until we replace it, including in the app itself.
1. [Enable Lightning Experience in your org](#). Users don't have to use Lightning Experience, but it must be enabled in your org.
  2. [Turn On the Integration with Outlook](#).
  3. [Enable Email to Salesforce](#). Have users check their Email to Salesforce settings to make sure that the email address they're using with Outlook is mapped. For more information, see [How Does Email to Salesforce Work?](#)
  4. [Enable Enhanced Email](#).
  5. Enable **Engage for Outlook** (in Outlook Integration setup).
  6. Ask users set up their email to Salesforce. Send them to [Set Up Email to Salesforce](#) for help.
  7. [Customize the Outlook Integration Pane](#).
  8. To allow users to view a prospect's activities from Outlook, [create custom email application panes](#).  
Engage for Outlook requires the People component, which is already included if you cloned the default Salesforce layout. If you create a layout, add the People component. Navigate to **Custom > Managed > Engagement History**, and add the component to your email pane.
  9. [Activate and assign email panes](#) for users.
  10. [Add the Salesforce Add-In from the Microsoft® Exchange® Center](#).

### USER PERMISSIONS

- To set up Engage for Outlook
- [Customize Application](#)