

The New Salesforce Admin Email CHECKLIST

Just inherited a Salesforce org? Audit the email setup on day one — before someone hits Send.

For: New Salesforce Admins
 · Admins inheriting an existing org
 Covers: Deliverability · Send Limits · Compliance
 · List Quality · Automations · Best Practices

DAY 1 — AUDIT FIRST

WEEK 1 — CONFIGURE & FIX

MONTH 1 — ESTABLISH NORMS

✉ DAY 1 — AUDIT EMAIL AUTHENTICATION

- Confirm SPF record is published for all sending domains Critical
- Confirm DKIM signing is active and passing — check via MXToolbox Critical
- Confirm DMARC policy exists — p=none minimum, document current policy Critical
- Check if any dedicated IPs are in use and note their warm-up history
- Verify From addresses are using authenticated, owned domains Critical
- Check for any third-party ESPs also sending from the same domain

📊 WEEK 1 — AUDIT LIST & DATA QUALITY

- Check bounce rate on recent campaigns — above 2% needs immediate action Critical
- Check spam complaint rate — above 0.1% is a red flag Critical
- Identify contacts with no engagement in 12+ months — flag for review
- Check for duplicate Contact and Lead records with same email address
- Verify hard bounces from previous sends are suppressed Critical
- Review list acquisition sources — any purchased or scraped lists in use? Critical

✉ DAY 1 — AUDIT SEND LIMITS & VOLUME

- Identify your Salesforce edition and calculate the org-wide daily limit Critical
- Run a send log report for the last 30 days — how close to the limit?
- List all Workflow Rules and Process Builder flows that send email alerts Critical
- List all Flow automations that trigger email sends Critical
- Identify any Apex code that calls SingleEmailMessage
- Calculate total automated email volume vs. daily limit headroom

⚙ WEEK 1 — DELIVERABILITY SETTINGS

- Check Salesforce deliverability setting — confirm it is set to All Email Critical
- Confirm organisation-wide email address is set and verified
- Review email relay settings if using a custom SMTP relay
- Check bounce handling thresholds in email deliverability settings
- Enable Einstein Activity Capture only if needed — audit any sending impact
- Document all sending domains and their authentication status

🛡 WEEK 1 — REVIEW COMPLIANCE SETUP

- Confirm every mass email template has a visible unsubscribe link Critical
- Confirm physical mailing address is in all outbound email footers Critical
- Verify unsubscribe field on Contact/Lead syncs to email opt-out correctly Critical
- Check suppression list is populated and applied to mass email sends Critical
- Confirm opt-out requests are being processed within 10 business days
- Review if GDPR or CASL compliance requirements apply to this org

🏆 MONTH 1 — ESTABLISH BEST PRACTICES

- Set a recurring calendar reminder to audit email automations quarterly
- Create a Salesforce report tracking daily outbound email volume Critical
- Set an alert when org reaches 80% of daily send limit Critical
- Document all active email templates, automations, and sending users
- Run a blacklist check monthly — MXToolbox or equivalent
- Brief the marketing team on send limits, compliance, and best practices

RULES OF THUMB

- Expect 10–20% list shrinkage.** A clean list outperforms a large dirty one every time.
- Always clean before you import.** Never let your new platform inherit your old data problems.
- Suppression list before contacts.** Load suppressions first — if you reverse this order, you will send to people who opted out.
- Never skip inactive contacts.** Sending to 12-month inactives will immediately spike complaints and damage your new IP's reputation.

Unchecked Item

Critical Must complete before importing — skipping risks deliverability or compliance

MIGRATING TO SALESFORCE –NATIVE EMAIL? MASSMAILER MAKES IT SIMPLE.

Import your cleaned list, load your suppression file, and send your first campaign — all natively inside Salesforce with no external ESP.

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