PURPOSE:

Within CRM, users have the ability to send emails and letters to those contacts set up in CRM to receive these mailings. Each individual contact can be set to receive mass emails by selecting Both, Campaigns, Email All, or there is the option to be unsubscribed in the "Edit Contact People" window in the "Mass Email" field.

PROCESS:

Mass Email
1. Navigate to CRM > CRM Reporting
2. On the CRM Reporting pre-filter screen, select appropriate information to filter (i.e. CRM Group).
3. Click the View button in header.
4. The filtered results will populate on the next screen.
5. In the header, Click Email All.
    a. The "Select an Email" box will pop-up.
    b. Select the email to be sent by double-clicking on the line.
    c. A pop-up box will then appear stating "You are about to send #x emails. Do you want to continue?" Click Yes.
6. Selected email will then be sent.

Mass Mail
1. Navigate to CRM > CRM Reporting
2. On the CRM Reporting t pre-filter screen, select appropriate information to filter (i.e. CRM Group).
3. Click the View button in header.
4. The filtered results will populate on the next screen.
5. In the header, Click Mail Merge.
    a. The "Select a Letter Template" box will pop-up.
    b. Select the letter template to be sent by double-clicking on the line.
    c. A pop-up box will then appear stating "You are about to print #x letters. Do you want to continue?" Click Yes.
6. Selected letter will then print.

REVISIONS

Rev	Date	Change
I/R	01/24/18	New
A	3/21/18	Formatting, Title/File name change
B	10/30/20	Change to v16 Menu names