How-To Hint: Creating an Email Template & Sending Mass Email

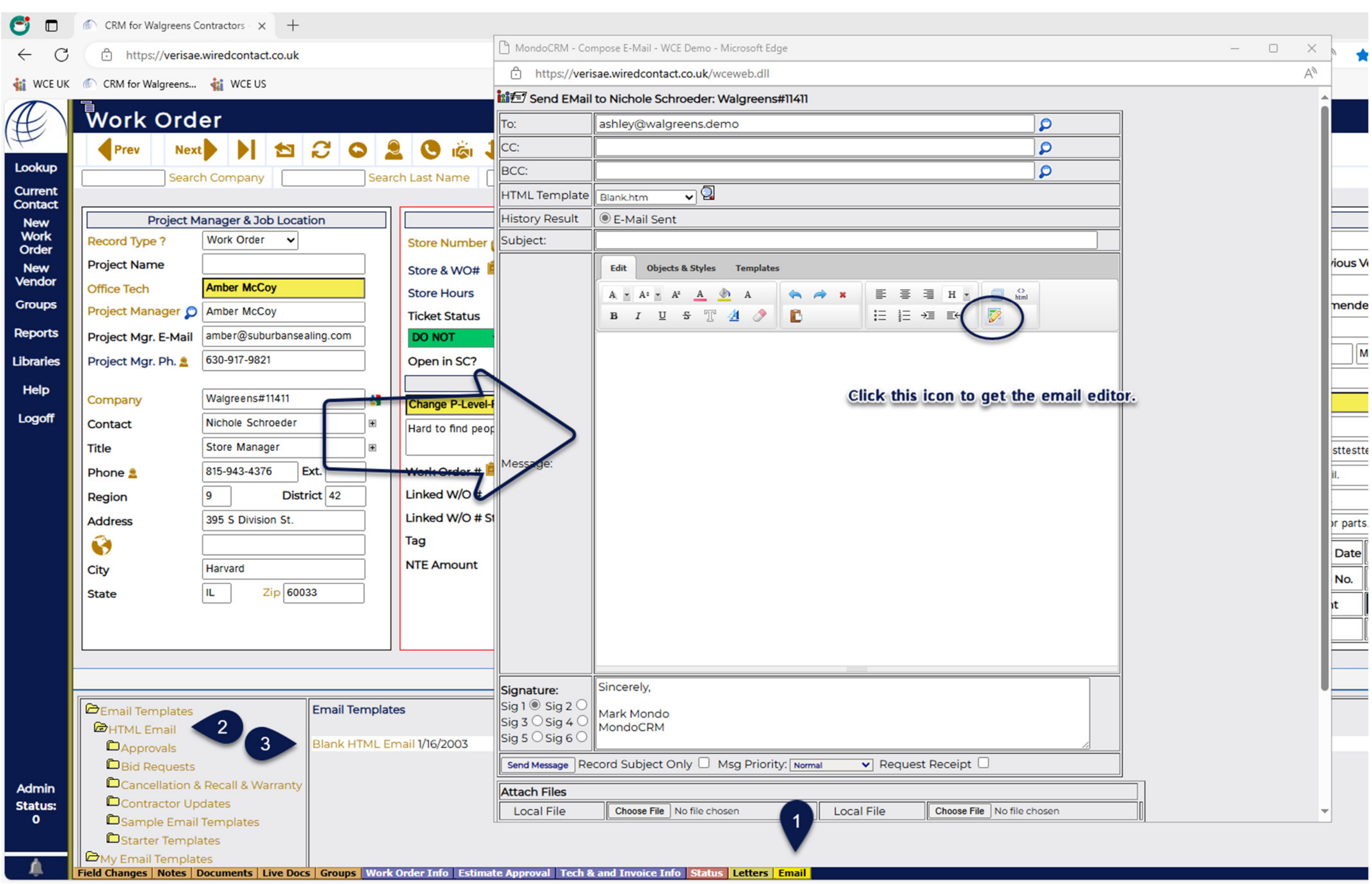
Users can create their own Letter and Email Templates to save future use. The Letter/Email template can easily be merged with fields from the contact's record to make the Email more personalized.

Users (with the respective permissions) can also make Email Templates Public to be available to users.

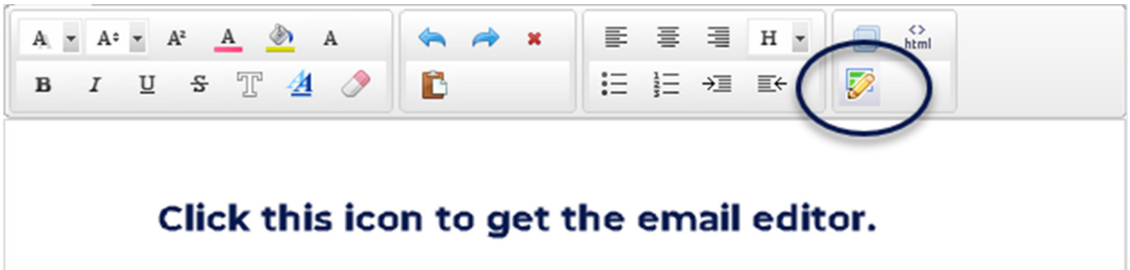
Users with permissions for broadcast emails can generate mass emails to a Lookup or a Group. Likewise, users with permissions can create mass letters.

A. Creating your Letter/Email Message (HTML formatted)

1. Go to any contact record. Click on the Email Tab. Click on "Blank HTML Email". The Email dialog window will appear.



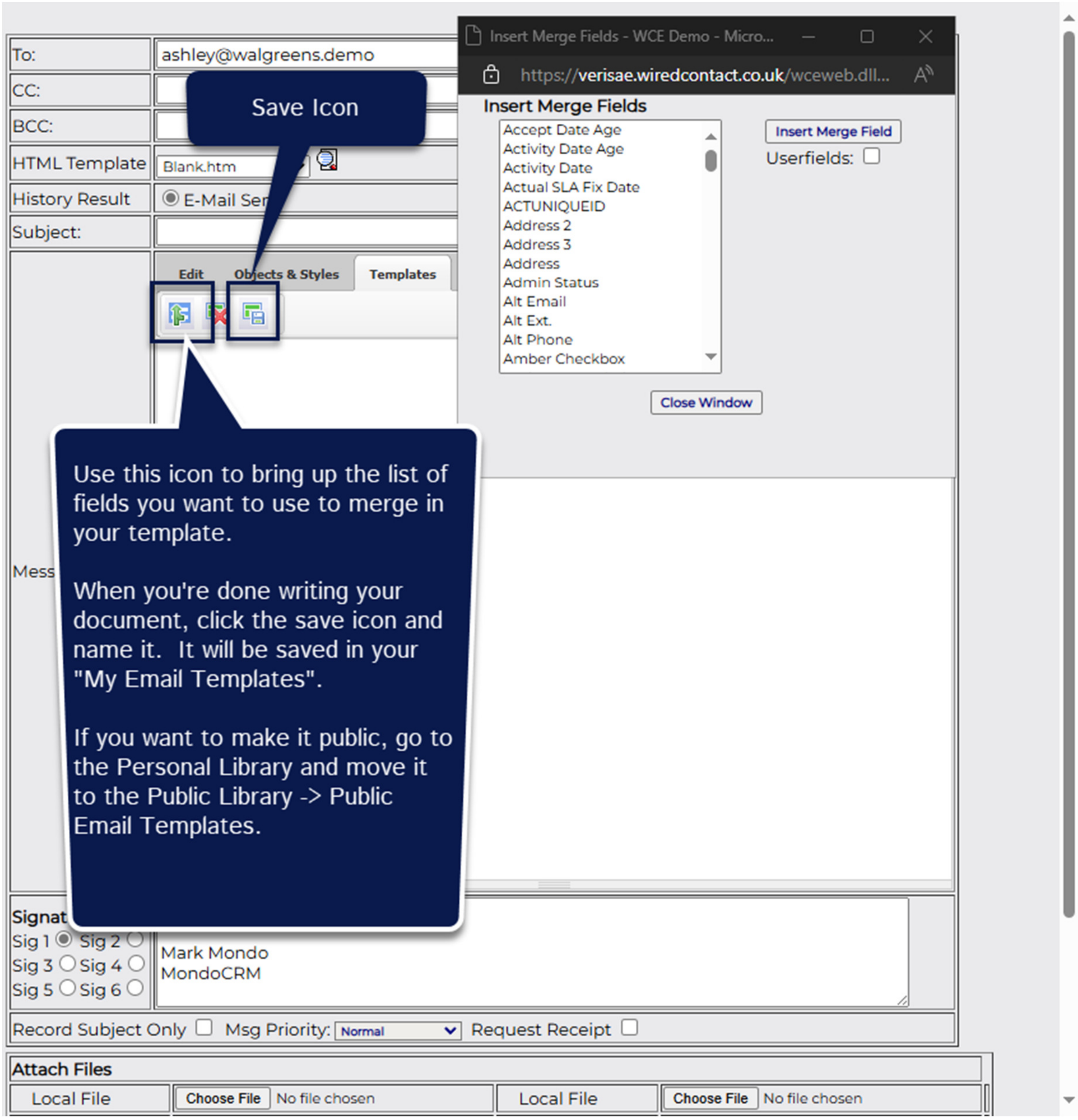
2. Click on the Editor icon to create your message.



3. Create your message. Free form the information you want displayed here. Use the Tool Bar to format the message for colors, bold, font type, images, etc. When you mouse over the icon, it displays the function of the icon.

   You can add merge fields from the database to personalize your message.

   For example, you may want your message to read, "Dear [[firstname]]". You can select the fields you want by clicking the icon with the up arrow. Select the field you want to merge in the appropriate place in your message, then click "Insert Merge Field".



You can also merge fields from your "my record". For example, if you would like the message to read, please call me at [[your phone number]], you can select the Phone field and checkbox "**Userfields**", then Insert Merge fields. This will merge the phone number from the User's My record into the template.

4. Select Options on the Email dialog:

a) **HTML Template** - Your site may have custom HTML Templates that you may want to select. Click on the HTML Template dropdown to select the Template you want. You can use the magnifying glass to see the graphics. If you do not select a Template, the default will be "Blank".

b) **Subject** – Recommended to always enter a subject

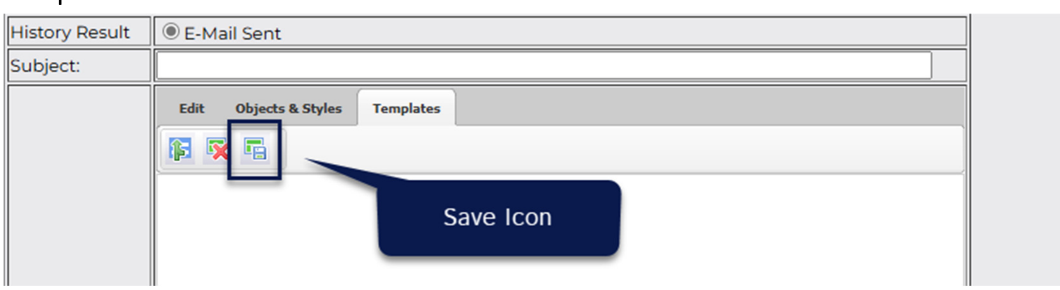
c) **Check off the delivery/history options:**
   i. Record Subject Only Box
   ii. Msg Priority
   iii. Request Receipt

d) **Signatures** – if your HTML template does not already have pre-defined signatures included, you can display your signature as appropriate. You can free form your signature and once you send an email it will "stick".

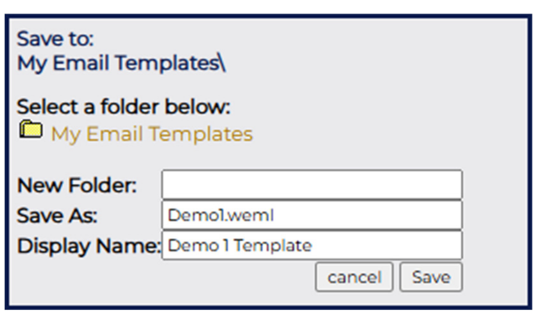
   Or, you can go to your User settings (click on the Top Menu > Utilities > User settings) and update your signatures there.

   You can select from multiple signatures and designate the signature you want for your Email Template.
   Saving your Template

e) Once you are done with writing your email message and settings your options, then you need to save your Template. Click on the Icon with the disk to save your template.



f) The Save Dialog appears:



Your E-mail Template will be saved under your Email Tab > MY Email Templates.

New Folder – If you want to place a sub-folder under the MY EMAIL TEMPLATE and save your template here, just enter the Sub Folder name

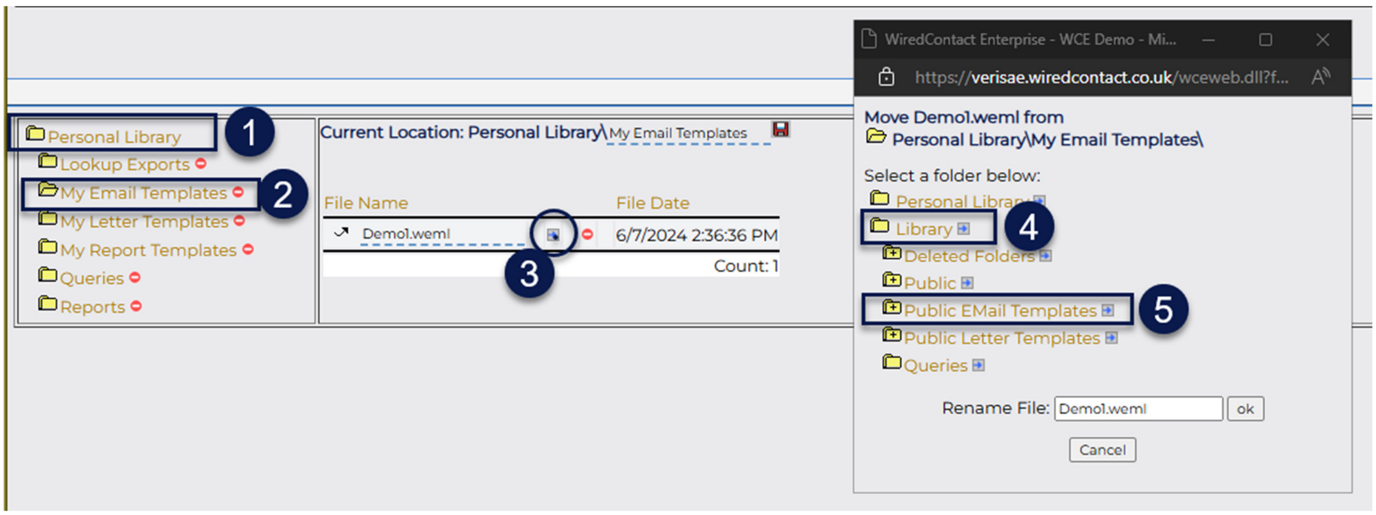
Save As – Enter the internal name of the template (recommended to make the same to the display Name). It must end in .weml

Display Name - Enter the name that will display under the My Email Template so you can select it in the future. Press the SAVE button

6. Display your Email Template to all users

   a. To enable all users to see your email template from your “My Email Templates” folder, your user setting needs permission to add to the Public Library. See your Administrator if your login does not have permission for this).

   b. Click on the **Libraries** Icon on the side bar > **Personal Library** > **My Email Templates**. Use the blue arrows to bring the respective email template to the Public Library > Public Email Templates.

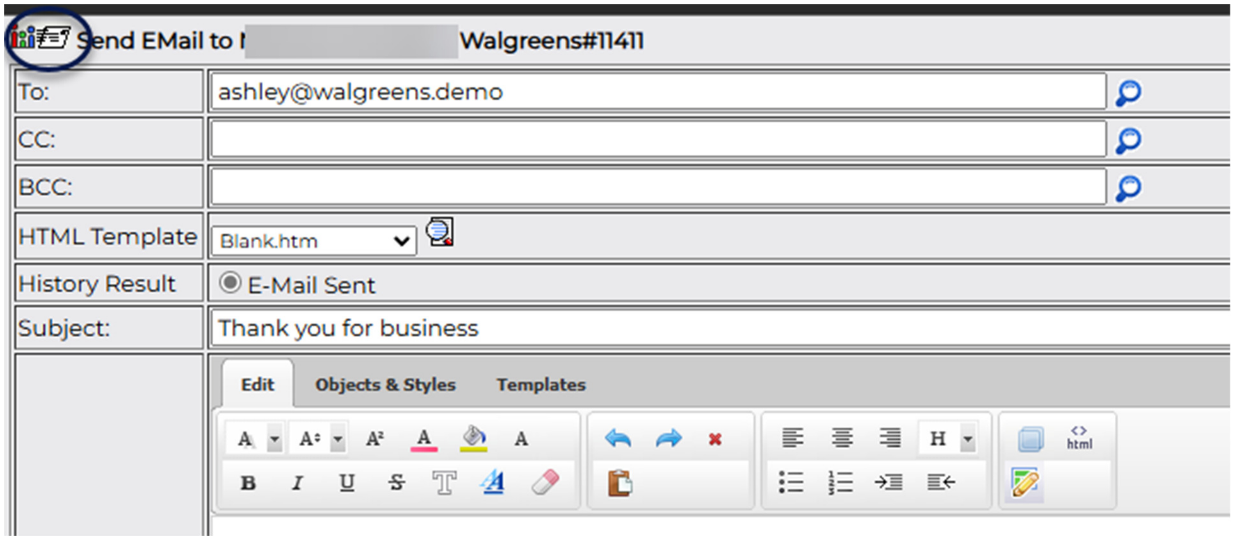


B. Sending Mass Emails

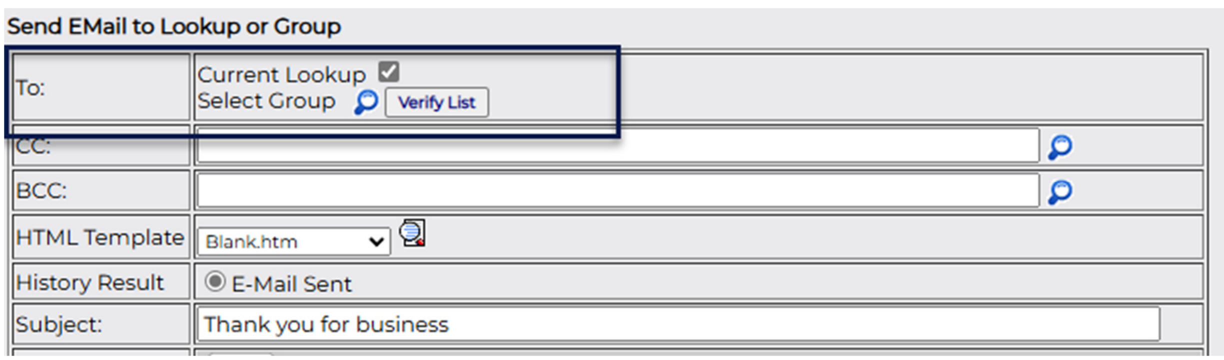
1. Users need permission in their User settings to perform a mass email. (If your login does not allow mass emails, please contact your System Administrator).

2. Users can send Mass Emails to an ad hoc Lookup or a Group.
   For example, perform a Lookup of the contacts you want to send your message to. Click on one of the Contacts > Go to the Email tab, then click on the template you want, ie. Blank Email with Logo or select one from your “My Email Templates’.

   In the upper left corner, you will see an icon. Click on that icon to send to multiple recipients.



Your email is now prepared to go out to all the Contacts in your email list. You can click on the “verify” button to verify this list.



Once you create your email, you can send it immediately or schedule it for future time. Click on the Clock icon to the right of the “send message”.

You can schedule the date/time using the clock icon at the bottom of the page. All scheduled campaigns can be viewed from the show/hide menu at the top of each page..... click on Utility > Scheduled Mass Email.

For further assistance, please email helpdesk@mondocrm.com.