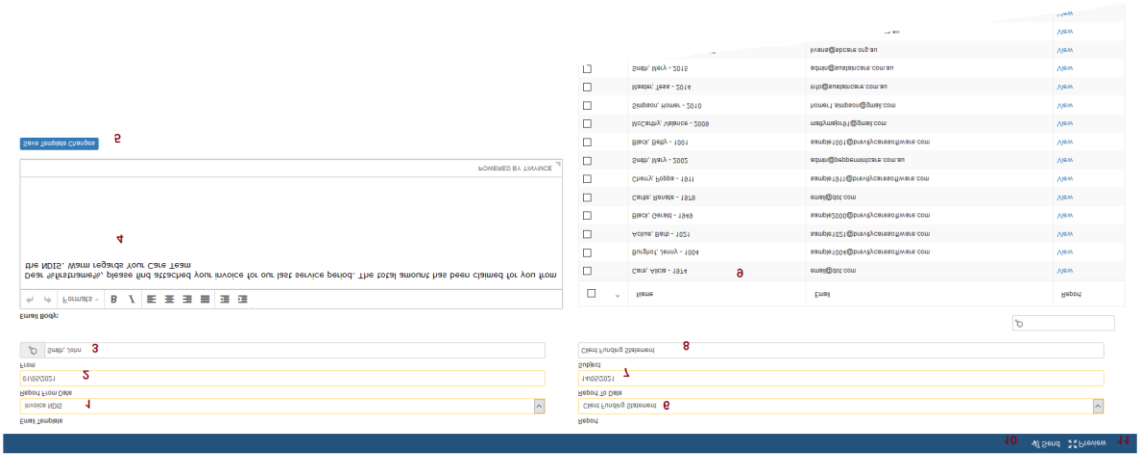
SD – Brevity – Sending Bulk email

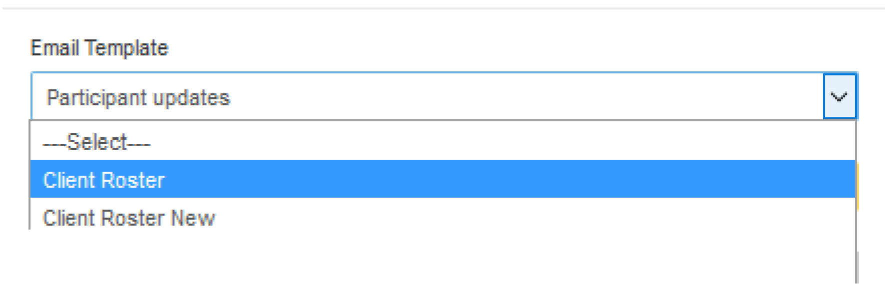
Click and preview the fields and objects maintained within the Bulk Email Notification page



Sending a Client Bulk Email notification

To undertake a Bulk Email Notification to your clients, observe the following steps:

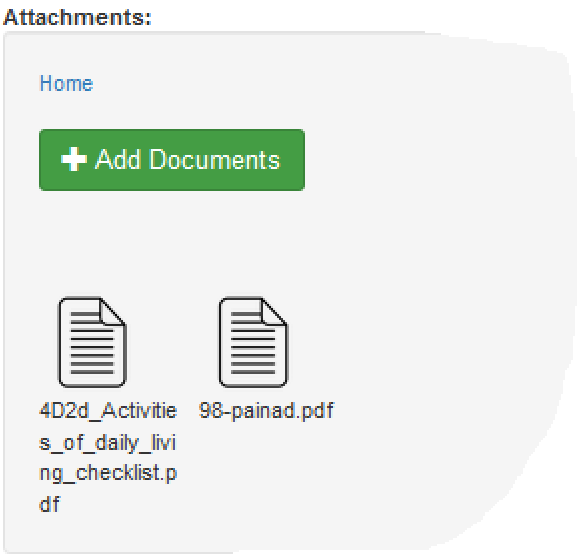
1. Select the Clients>Bulk Email notifications menu option to open the Bulk Email notification page.
2. Within the Email Template field select from the drop down list the required template that will be used as the basis of your communication with your clients.



Selection of the required template will update the Email Body field with the content of the message.

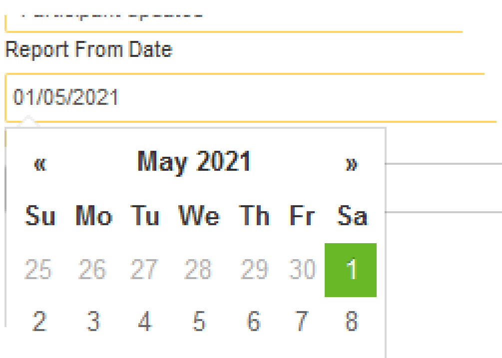
3. Within the Report field select the report that will be used.

   Please note that selecting the GENERAL EMAIL option from the list will (1) hide the reporting date range fields and (2) allow for you to add attachments to the bulk email



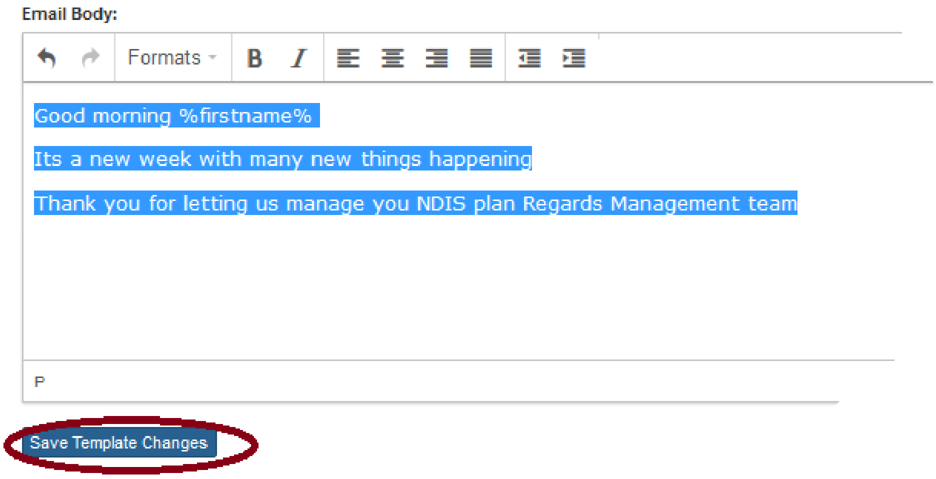
   To add attachments to a general email, select the Add Documents button to present the file upload screen, search for and select the documents that are to be attached to the email.

4. Where **GENERAL EMAIL** has not been selected, you can within the Reported from Date field, input in free text or select from the date picker the start date of the reporting period.

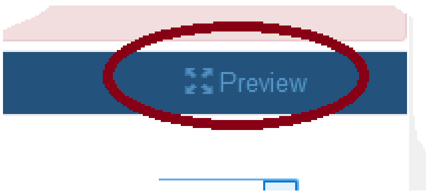


5. Where **GENERAL EMAIL** has not been selected. you can within the Reported To Date field input in free text or select from the date picker the end date of the reporting period.
6. Within the From field either accept the default login name that has been listed, or position your cursor in the field , clear the results and search for alternate user name.
7. With the subject field input the purpose of the email.
8. Review the content of the Email Body, make any adjustments to text and wording, formatting, indentation and alignment.

   Any changes made can be saved for future use by selecting the **Save Template Changes** button.



9. Where **GENERAL EMAIL** has been selected, click the PREVIEW button from the ribbon bar to display a list of all the client's that you can send an email to. Either Individually select the client records or select all.



10. Click on the send email to send the email to the selected recipients. An icon will be presented to alert you as to whether the email has been successfully sent or failed.

    Green checkbox means the email was sent successfully
    Red X icon means the email failed to send