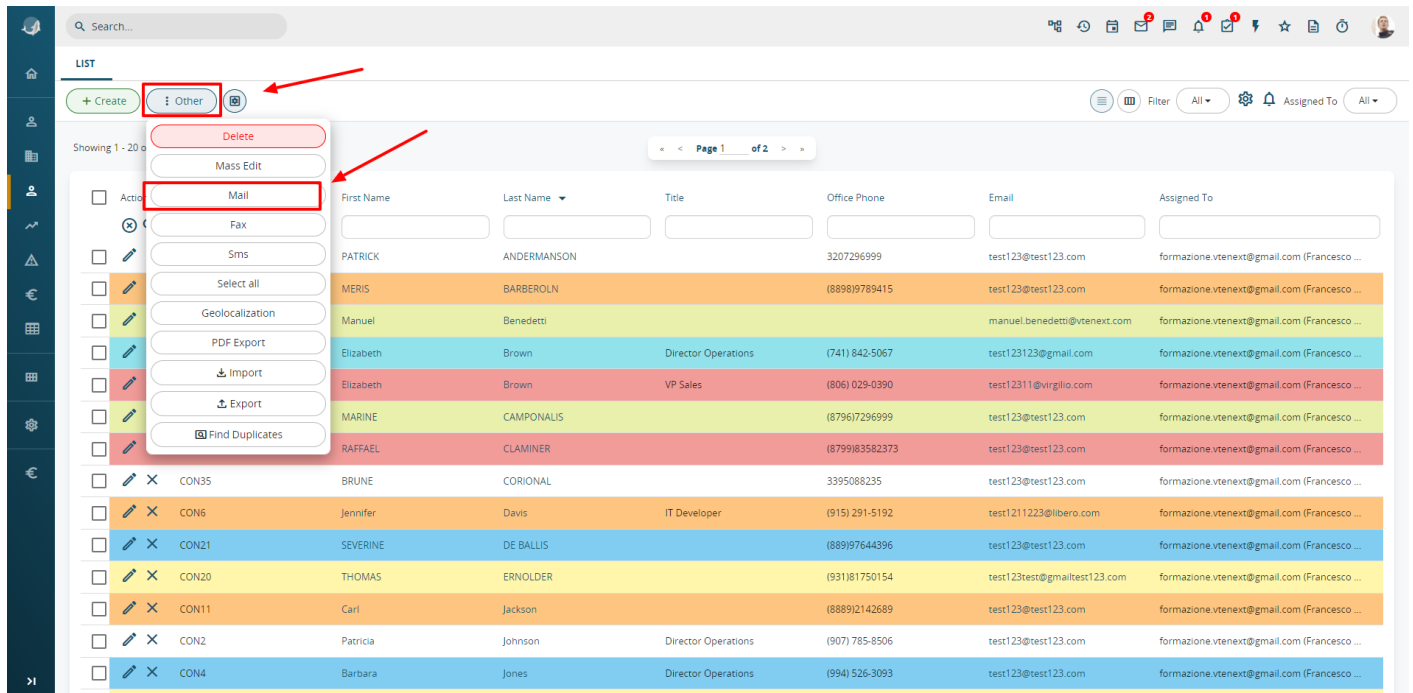


5.2.7 Mass email

A mass mailing tool is available send an email to multiple recipients (20 max) in a single shot. Select the email recipients from the list view of the desired module, e.g. Leads, then click on the

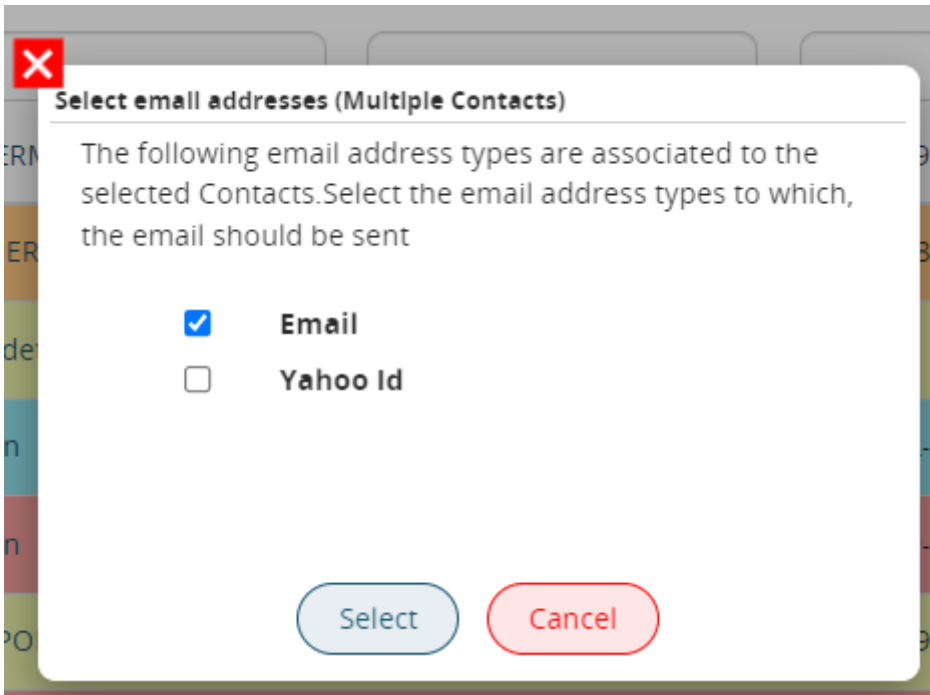
button  followed by Email, located above the records list.



The screenshot shows the CRM interface with a list of records. The top action bar contains buttons for '+ Create', 'Other', and a grid icon. The 'Other' button is highlighted with a red box. A dropdown menu is open, showing options: 'Delete', 'Mass Edit', 'Mail', 'Fax', 'Sms', 'Select all', 'Geolocalization', 'PDF Export', 'Import', 'Export', and 'Find Duplicates'. The 'Mail' option is highlighted with a red box. A red arrow points to the 'Mail' option. Another red arrow points to the 'Email' field in the record header. The record header shows fields: First Name, Last Name, Title, Office Phone, Email, and Assigned To. The records list shows columns: First Name, Last Name, Title, Office Phone, Email, and Assigned To. The records are color-coded by status: orange for 'New', yellow for 'In Progress', and blue for 'Completed'.

First Name	Last Name	Title	Office Phone	Email	Assigned To
PATRICK	ANDERMANSON		3207296999	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
MERIS	BARBEROLN		(8898)9789415	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
Manuel	Benedetti			manuel.benedetti@vtenext.com	formazione.vtenext@gmail.com (Francesco ...)
Elizabeth	Brown	Director Operations	(741) 842-5067	test123123@gmail.com	formazione.vtenext@gmail.com (Francesco ...)
Elizabeth	Brown	VP Sales	(806) 029-0390	test12311@virgilio.com	formazione.vtenext@gmail.com (Francesco ...)
MARINE	CAMPONALIS		(8796)7296999	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
RAFFAEL	CLAMINER		(8799)83582373	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
BRUNE	CORIONAL		3395088235	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
Jennifer	Davis	IT Developer	(915) 291-5192	test1211223@libero.com	formazione.vtenext@gmail.com (Francesco ...)
SEVERINE	DE BALLIS		(889)97644396	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
THOMAS	ERNOLDER		(931)81750154	test123test@gmailtest123.com	formazione.vtenext@gmail.com (Francesco ...)
Carl	Jackson		(8889)2142689	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
Patricia	Johnson	Director Operations	(907) 785-8506	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)
Barbara	Jones	Director Operations	(994) 526-3093	test123@test123.com	formazione.vtenext@gmail.com (Francesco ...)

The system prompts you to choose one or more of the email type fields available in the record (can be Email address, Other email address, Yahoo ID).



The new email composition window will then appear. The email addresses in the chosen fields will be set as recipients ("To" field).

Before sending the email check the "Sending Method", setting it to Multiple in order to keep recipients hidden (recipients will only see their own address).

Send Mode

☒ Single

☐ Multiple

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