Tips & Tricks

Batch Emailing from File

Did you know that you can import a file of Customers or Contacts for use in Batch emailing so you are not just restricted to the filters on the Lists for deciding which Customers or Contacts you wish to email?

You could use this feature for importing a file of Customers from a SA report to use in a marketing email.

Or, let's say you wanted to email all the Contacts of Customers belonging to a specific Customer Category, I will demonstrate how to do this.

First, create your Contacts report.

Navigator > Reports > Accounts Receivable > Customer Reports > Add Layout > Contact





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Apply your Filter. To make sure you only report on Contacts with an email address, use this filter along with your other filter.

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Navigator > Reports > Accounts Receivable > Customer Batch Email





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