

## Tips & Tricks

### Batch Emailing from File

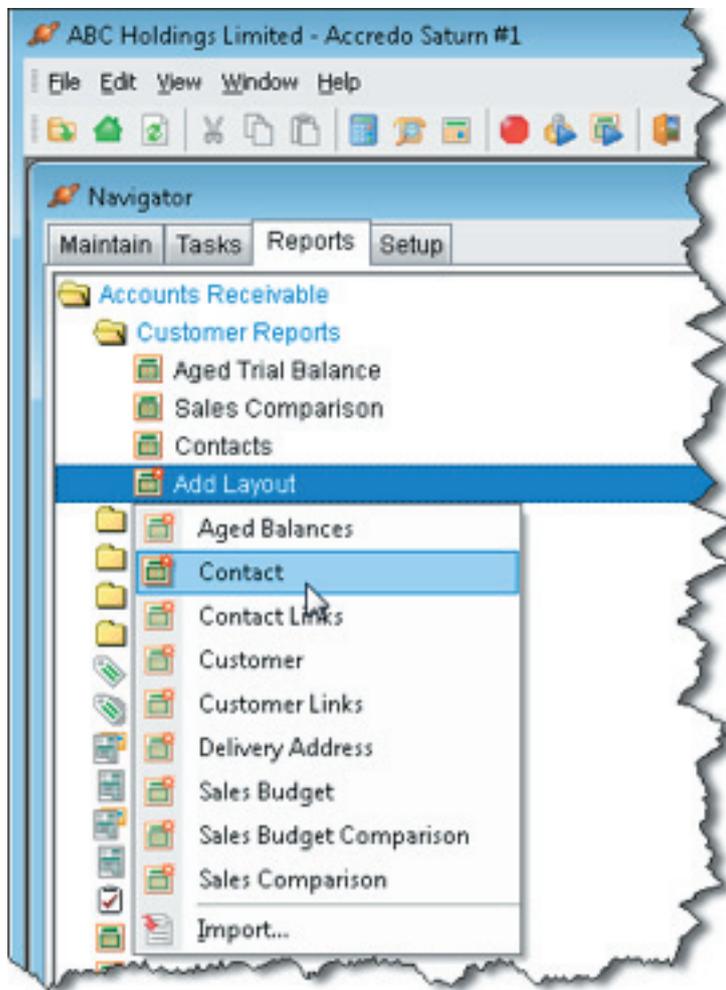
Did you know that you can import a file of Customers or Contacts for use in Batch emailing so you are not just restricted to the filters on the Lists for deciding which Customers or Contacts you wish to email?

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

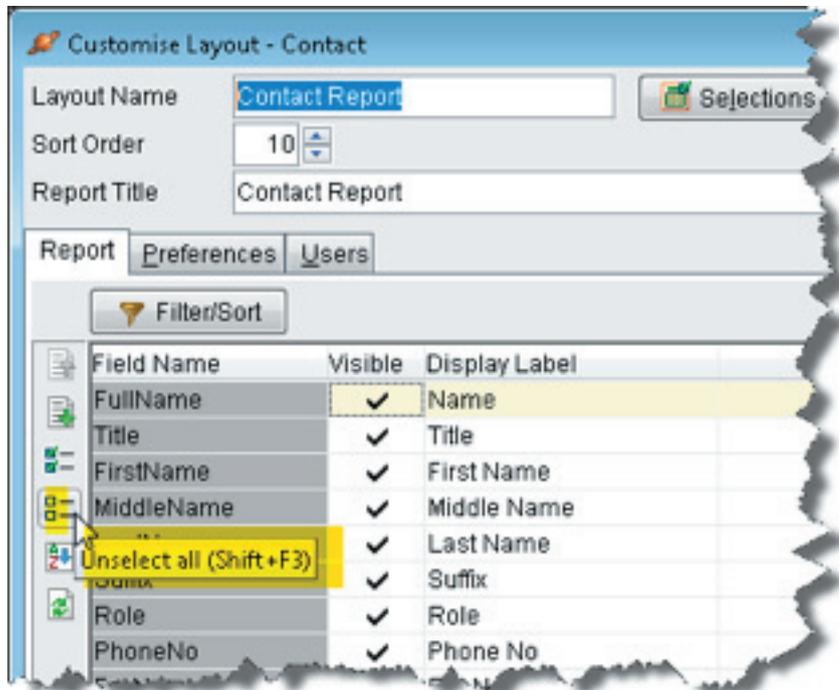
Or, let's say you wanted to email all the Contacts of Customers belonging to a specific Customer Category, I will demonstrate how to do this.

First, create your Contacts report.

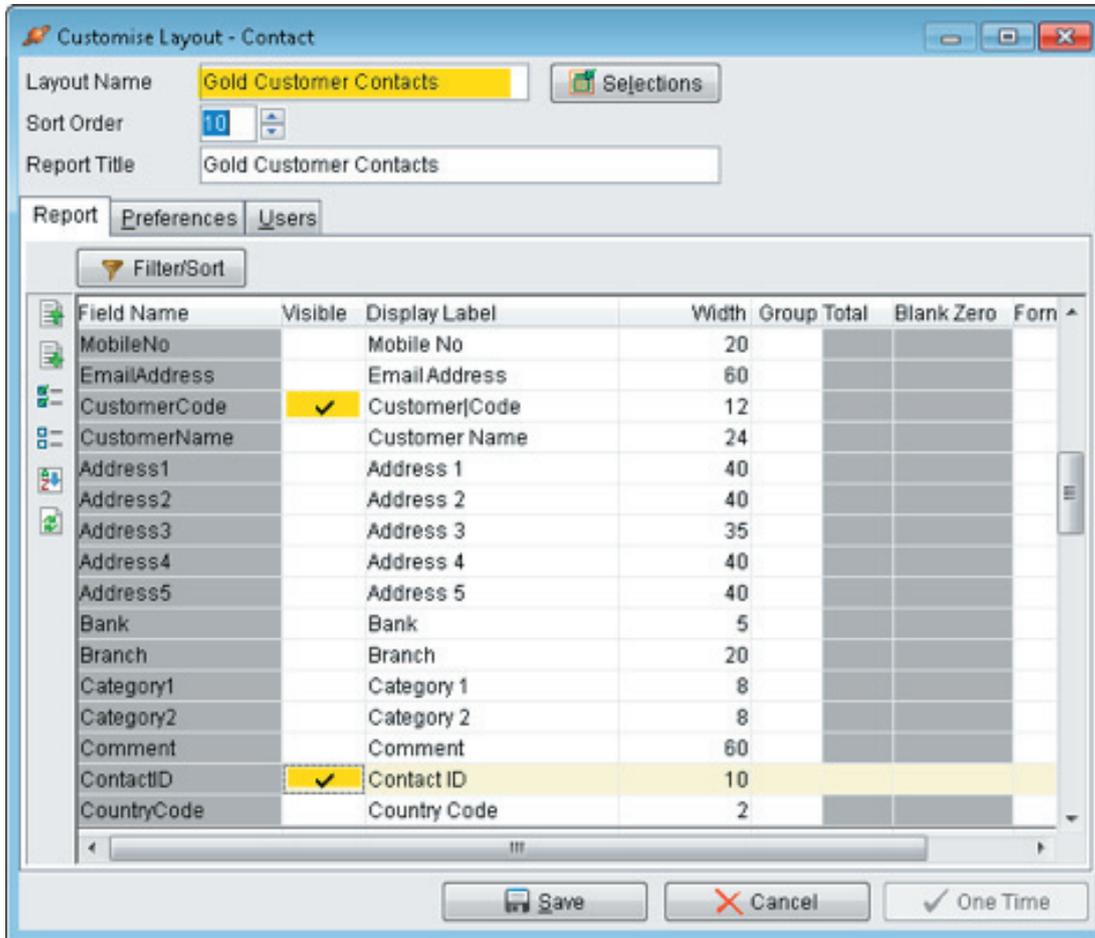
**Navigator > Reports > Accounts Receivable > Customer Reports > Add Layout > Contact**



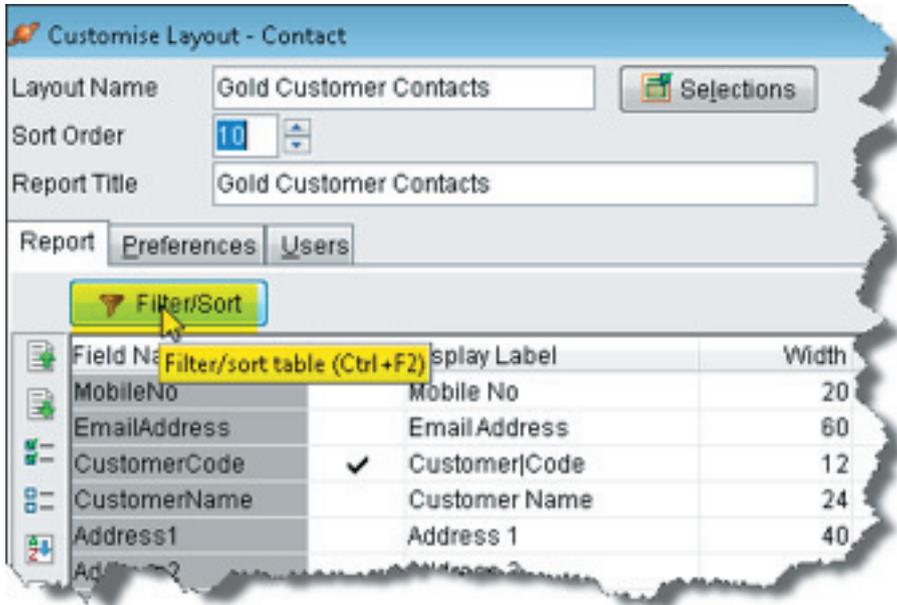
Click the 'Unselect All' button:



Tick Customer Code and Contact ID and give the Layout a meaningful name: →

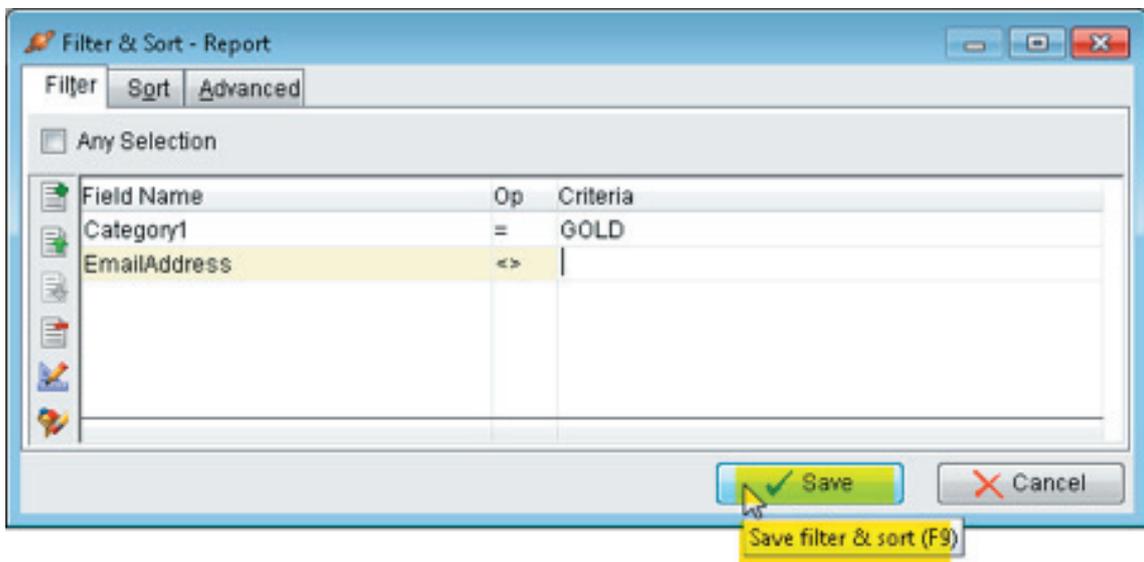


Click the Filter/Sort button:

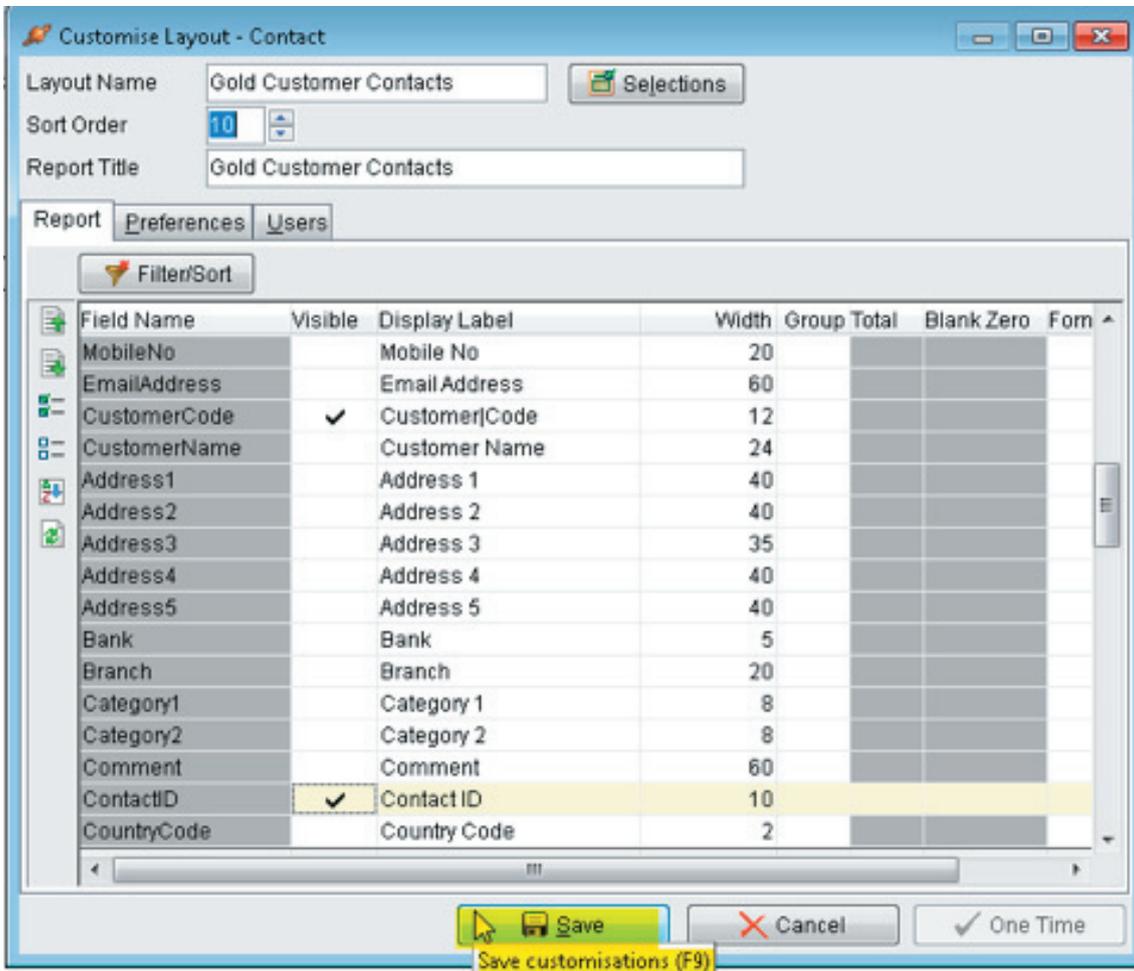


Apply your Filter. To make sure you only report on Contacts with an email address, use this filter along with your other filter.

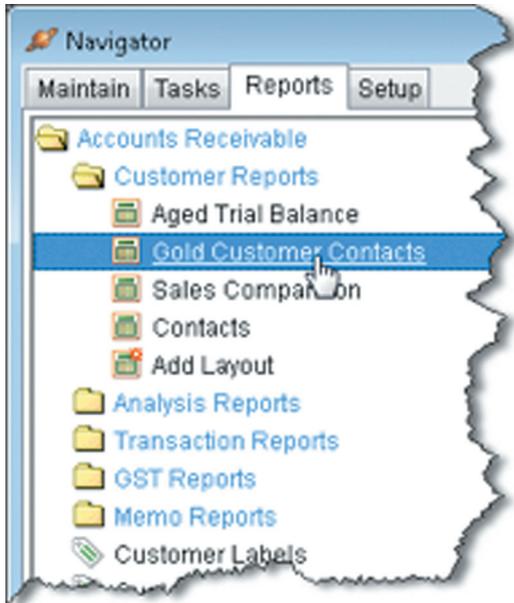
EmailAddress <>



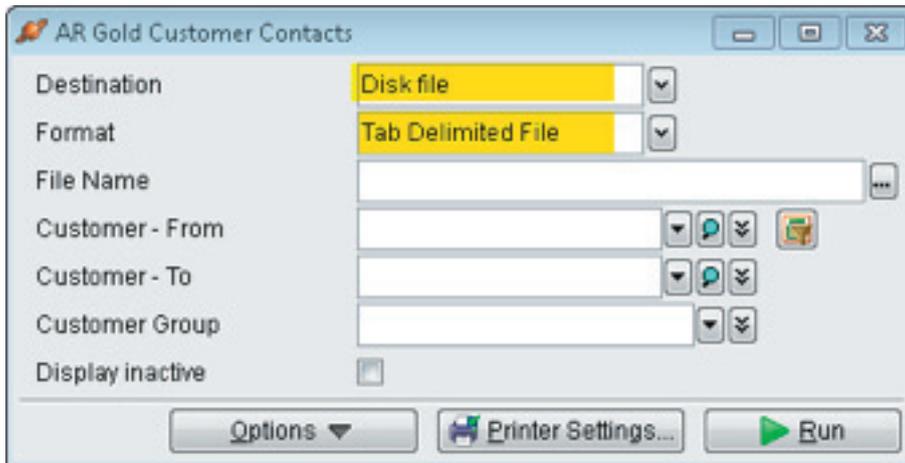
Then click SAVE to save the Filter into the layout. Then Save the layout:



Click the Report that has been added:



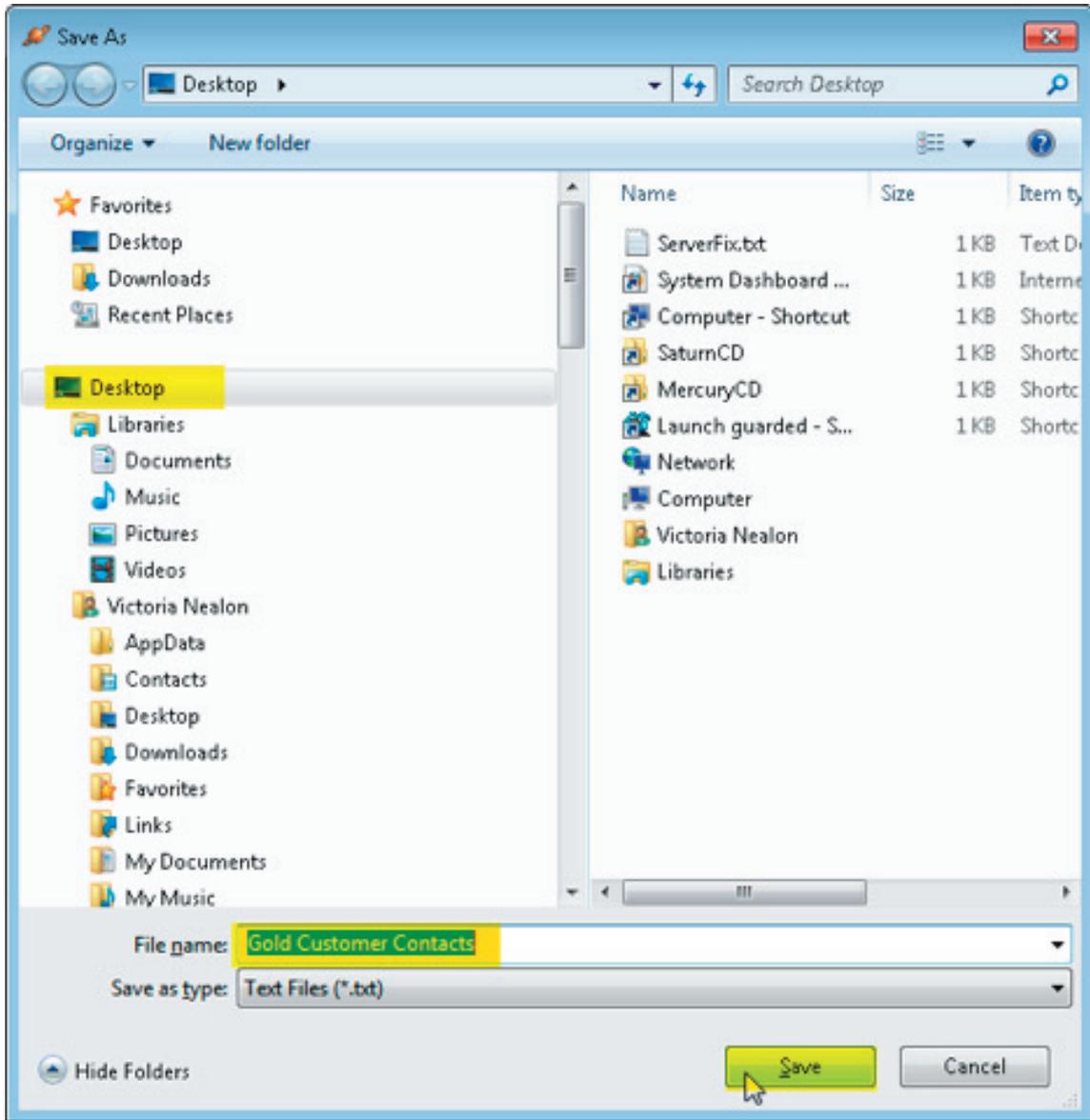
The report selections show:



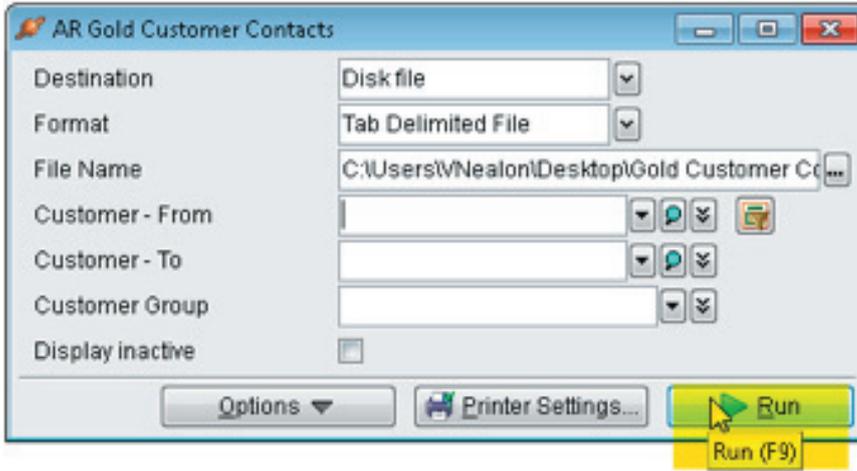
**Destination:** Disk File

**Format:** Tab Delimited File

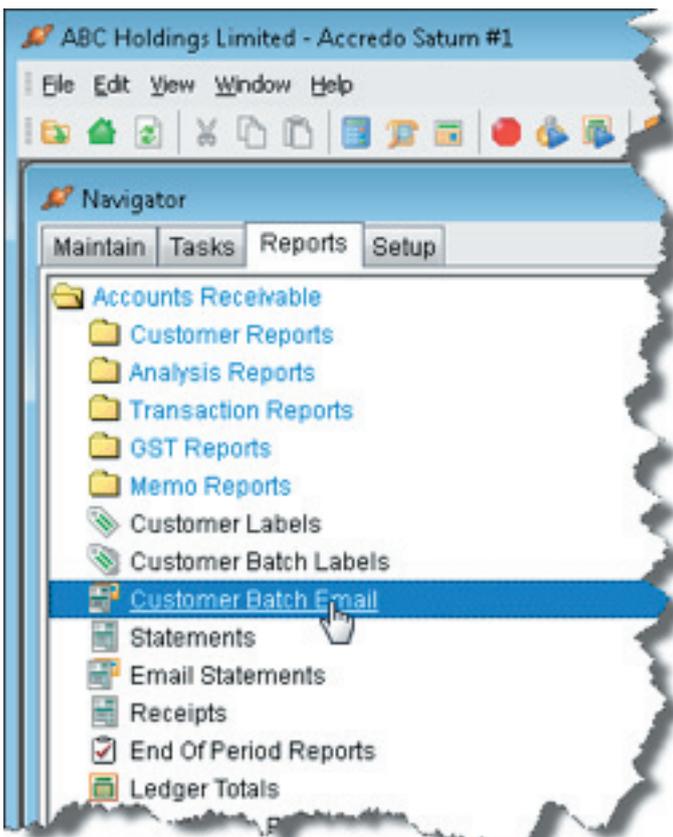
**File Name:** Press F2 and select Desktop and give the file a name and then press SAVE. →



Click RUN and the file will be created and saved to the Desktop:

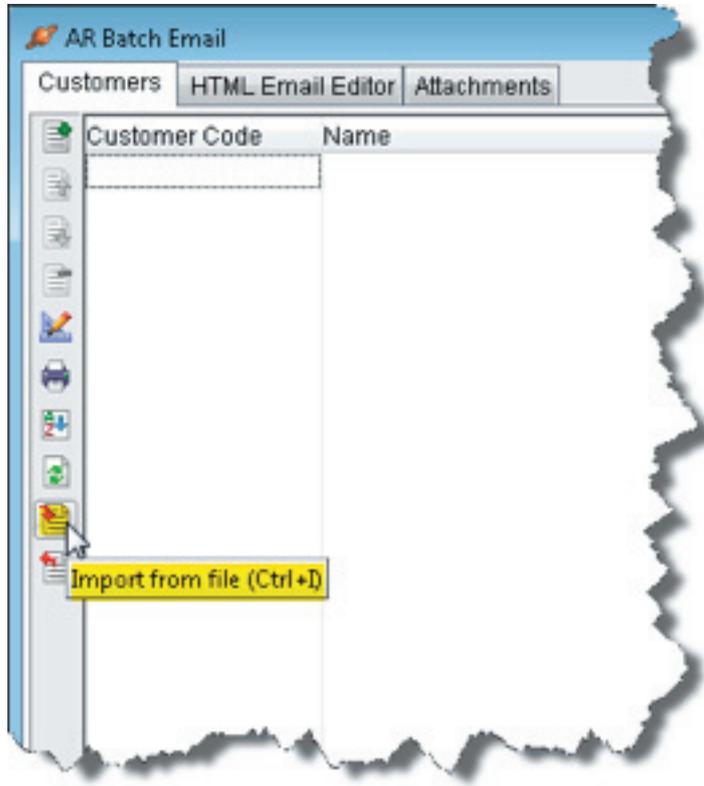


Navigator > Reports > Accounts Receivable > Customer Batch Email

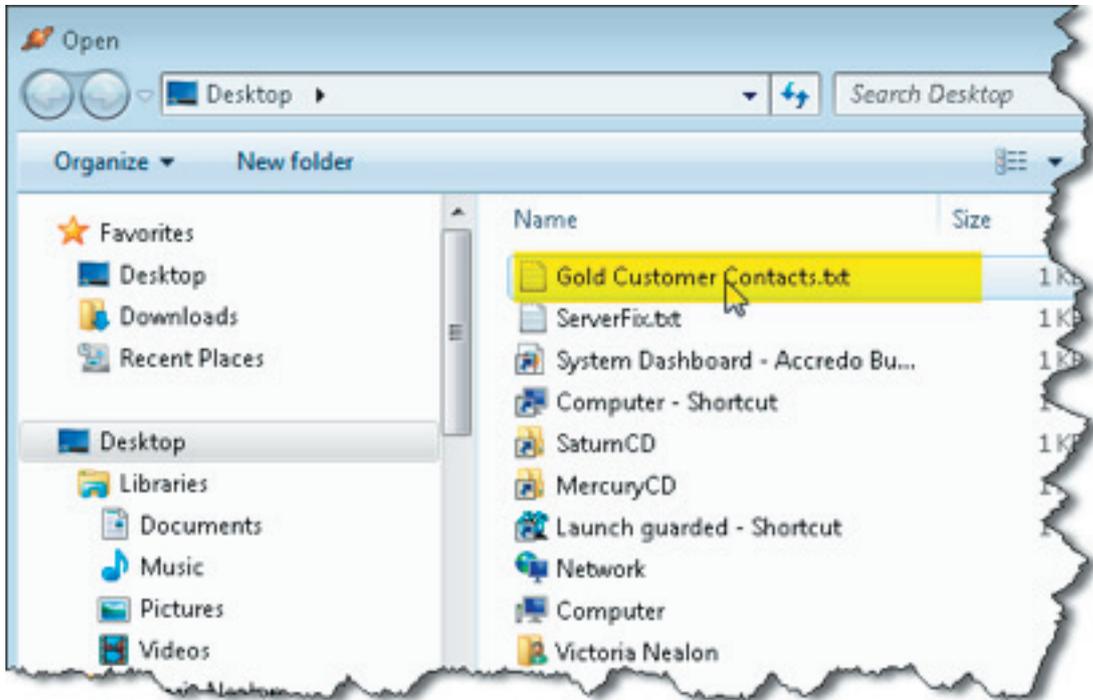


Batch Emailing from File Accredo version: 3.5.8.908

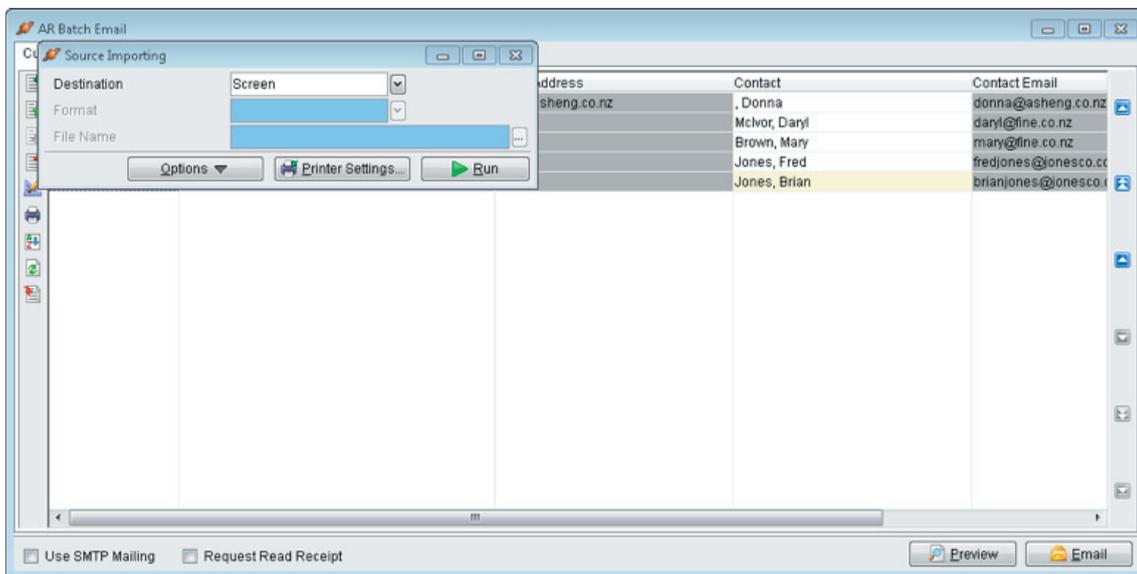
Click Import from File:



Double Click on your saved file: →



Your contacts will be loaded into the screen, with an option to print a report to check the results.

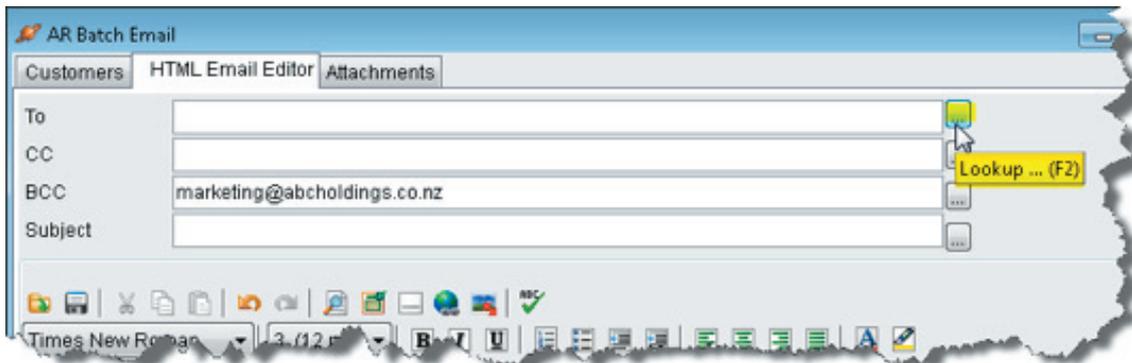


Press: Run to view the results. A report will display: →

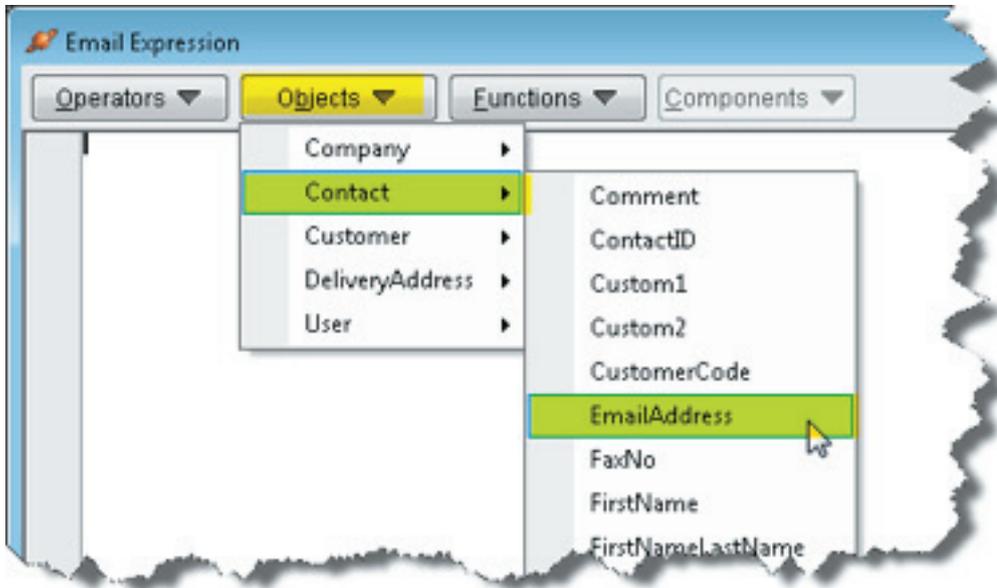
### Batch Emailing from File Accredo version: 3.5.8.908



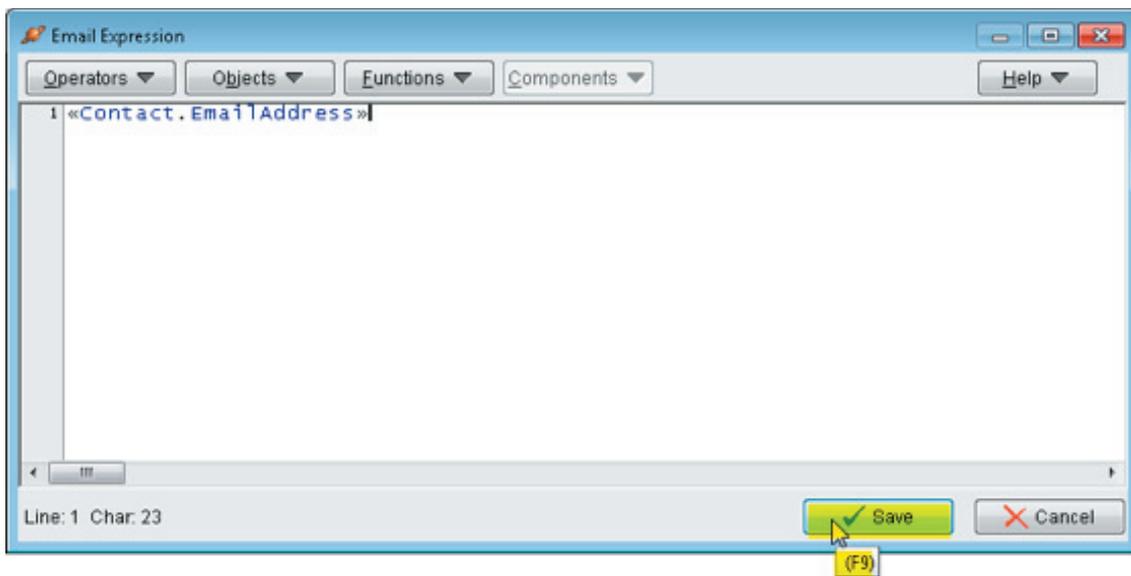
Press Escape, then click the HTML Email Editor Tab. Click in the To field and press F2 or click the Lookup Button:



Then click Objects > Contact > EmailAddress: →



The Contact Email Address expression displays as below:

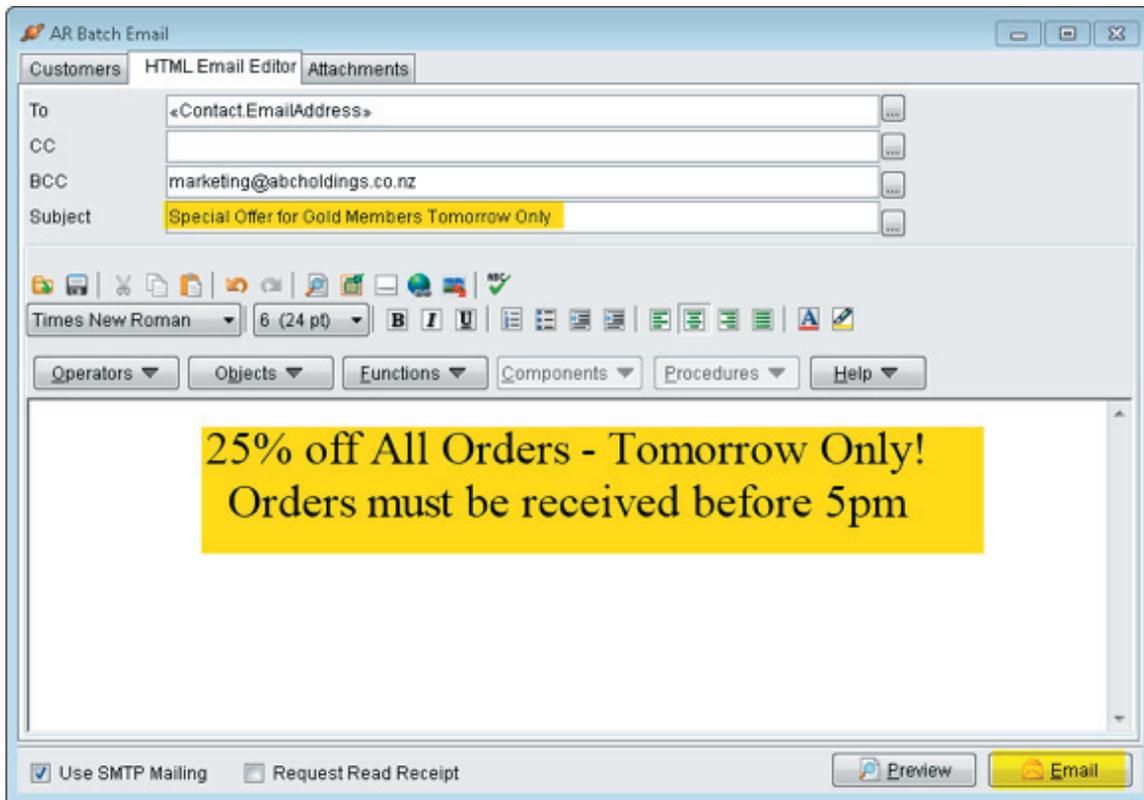


Click: Save.

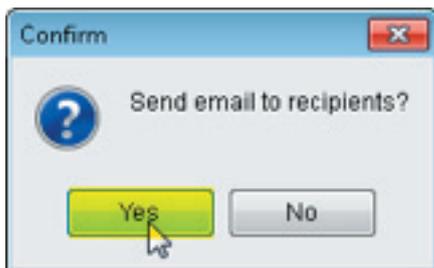
Then enter a Subject and type your message into the body of the email.

If you are using SMTP Mailing, CC and BCC will be populated by email addresses from your User Settings.

We recommend using SMTP mailing for Batch Emailing. See the Help for more on SMTP Mailing or contact Accredo Support or your QSP.

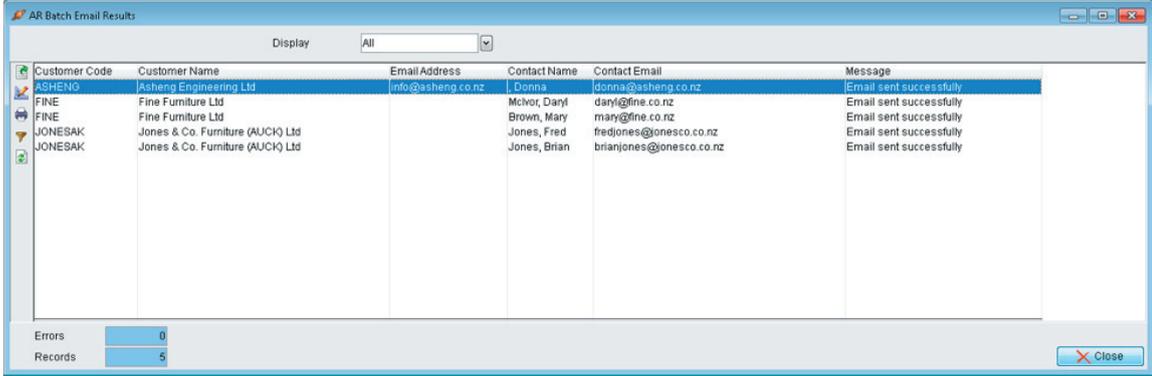


Click Email and a prompt will display:



Press YES at the confirmation prompt, to send the email to all the Contacts you imported.

A results screen will report the status of each email:



The screenshot shows a window titled "AR Batch Email Results" with a "Display" dropdown menu set to "All". The window contains a table with the following data:

Customer Code	Customer Name	Email Address	Contact Name	Contact Email	Message
ASHENG	Asheng Engineering Ltd	info@asheng.co.nz	Donna	donna@asheng.co.nz	Email sent successfully
FINE	Fine Furniture Ltd		McIvor, Daryl	daryl@fine.co.nz	Email sent successfully
FINE	Fine Furniture Ltd		Brown, Mary	mary@fine.co.nz	Email sent successfully
JONESAK	Jones & Co. Furniture (AUCK) Ltd		Jones, Fred	fredjones@jonesco.co.nz	Email sent successfully
JONESAK	Jones & Co. Furniture (AUCK) Ltd		Jones, Brian	brianjones@jonesco.co.nz	Email sent successfully

At the bottom of the window, there is a summary section:

Errors	0
Records	5

A "Close" button is located in the bottom right corner of the window.