

IDM Farm Manager E-mailing to a Group

Create the group of email clients to send to:

1. Open the Contact module
2. Click “Tools”, “Group” and “Search by Example”
3. Click in the email field and type “\$@” (\$ is a wild card to select all contacts that contain an email address).
4. Name the Group “All contacts with email”
5. Check the box “Save Group Definition”
6. Click “OK”

Sending an email letter to saved group:

1. Open the Word Processor and create the letter (Email) to send to your contacts (or you may skip this step and use an existing form letter, proceed to step 4)
2. Click “File”, “Save”, select “Form Letter”, select a category, give the letter a name, type a subject in the E-mail Subject field and then click OK.
3. Close the Word Processor
4. Open the Contact module
5. Open the group to send to (Tools, Group, Saved Group)
6. Click “Write”, “Form E-mail”
7. Click “All contacts with email” in the “Send to” option
8. Click the box next to the Bcc option (this makes each message look as though it is the only recipient).
9. Click OK
10. Select the letter you created above.
11. Answer Yes or No per your preference to the next questions.
12. Type a subject for this email. This is important so the recipient knows it is not junk mail.
13. Click OK
14. If you are prompted that you have merge fields in your letter answer “Yes”.
15. You will be notified that the messages have been sent.

Tip: To email to a specific category with email addresses, create a group where you enter “\$@” in the email field ***and*** enter the category name you want in the Category field and then save the group to use in your email.

Tip: Emails are sent as text only (Plain Text) so your email letters cannot contain graphics.

Tip: Group emails cannot contain attachments but you can insert attachments into individual emails.

Tip: Send a sample email to yourself so you can see what it will look like before sending to a customer.

Tip: You may want to create a set of letters just for email that don't contain graphics and a set for printing that contain graphics (i.e. Your picture, Company logo etc.)



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