

Clients – Actions – Write Email

From the main Clients page your eBoss database allows you to quickly send a Client or Clients an email.

1 - Send Email to Individual Client

Look in the Actions column on the right and click the Envelope icon with the plus symbol. This presents you with the Notes & Communications: Compose Email window.

- Enter any other email addresses you'd like to send to in the CC or BCC fields
- Enter the Subject for the Email
- Choose the Style from the drop down menu
- Choose the Template from the drop down menu
- Enter the Email body text, and format as required using the toolbar
- Check the box if you want to be informed the message has been received
- Check the box if you would like to save this message as a Template, and enter a name
- Click to Attach a document to the Email
- Click Send

Your Email will be sent to your recipient.

2 – Send Email to Multiple Clients

Filter & Select Multiple Clients

- Navigate to the Clients screen in your main navigation menu on the left
- Select the desired Clients either by:
 - Selecting individually using the checkbox to the left
 - Selecting all Clients on the screen by clicking the checkbox to the top of the column
 - Using the 'Select All' link to the right of the Filter button at the top of the list – this differs from the above in that you will select all the Clients, from all the Pages listed
 - Using Advanced Search to filter your list of Clients

Sending the Email to Multiple Clients

Once you have the required list of Clients:

- Choose 'Write Email' from the dropdown list at top left
- Click Apply

- Check the list of Clients presented in the Compose Email screen
- Enter any CC or BCC recipients required
- Enter the Subject
- Choose a Style & Template for the Email
- Enter your message, using the toolbar to format text and insert any required tags or links
- Check the box if you would like a 'Read Receipt'
- Check the box and enter a name if you wish to save this Email as a Template for future use
- Click 'Upload a File' if you wish to attach a document to this Email
- Click Send

Your Email will be sent to your recipients. *Note – if you have selected a lot of Clients to email, your system will normally process around 300 per hour depending on server load.