**CRM Solutions**
by LeadMaster

Email Marketing Campaigns

When you want to send a mass email out to your contacts you will need to do so with an "Email Campaign."

To send a mass email such as a newsletter or announcement, find the "Marketing Studio" or "Campaign" menu on the top banner. Depending on your setup, this may be named differently. Contact your company's admin if you do not see the option in the main menu:
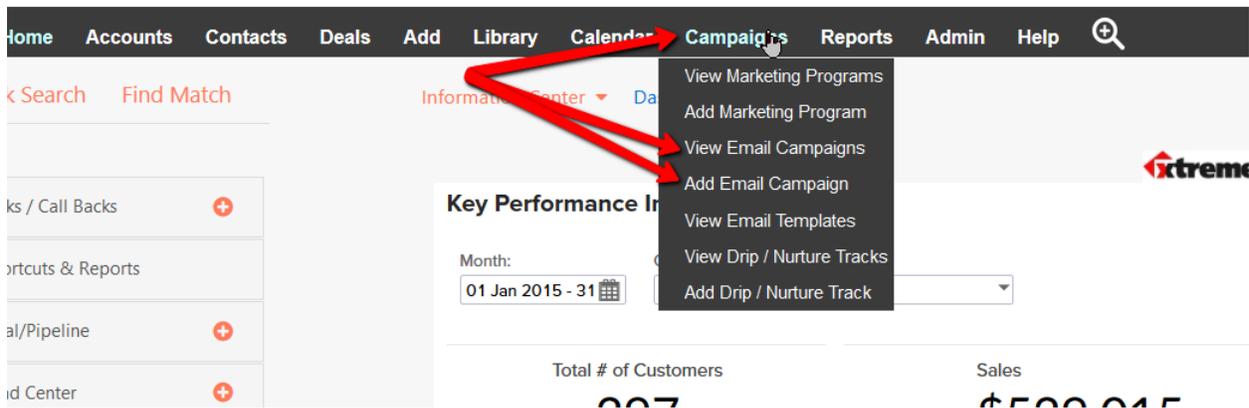

From the "View Email Campaigns" menu, you will see a page with a list of all previously created Email Campaigns. (See below image)
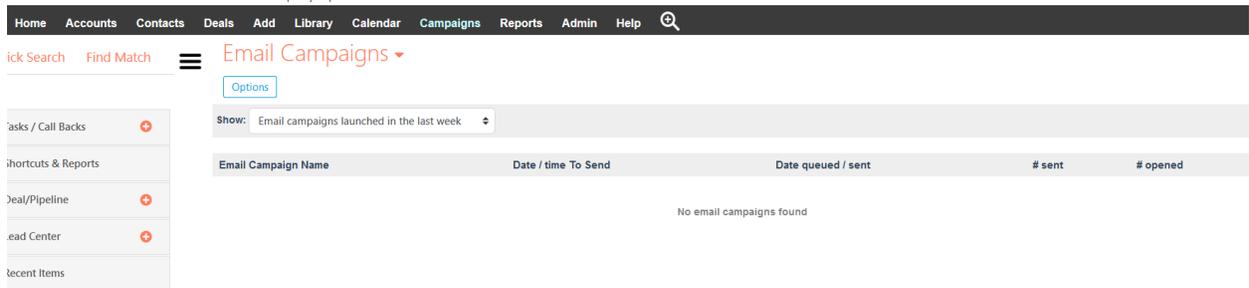
From this screen you may view details of your campaigns such as the Name, Date it was set to send, and even the number of sent/opened emails.

Clicking the "Options" menu button at the top allows you several options such as launching/creating a new Email Campaign, Reporting on Email Campaigns, and Managing your Email Templates.
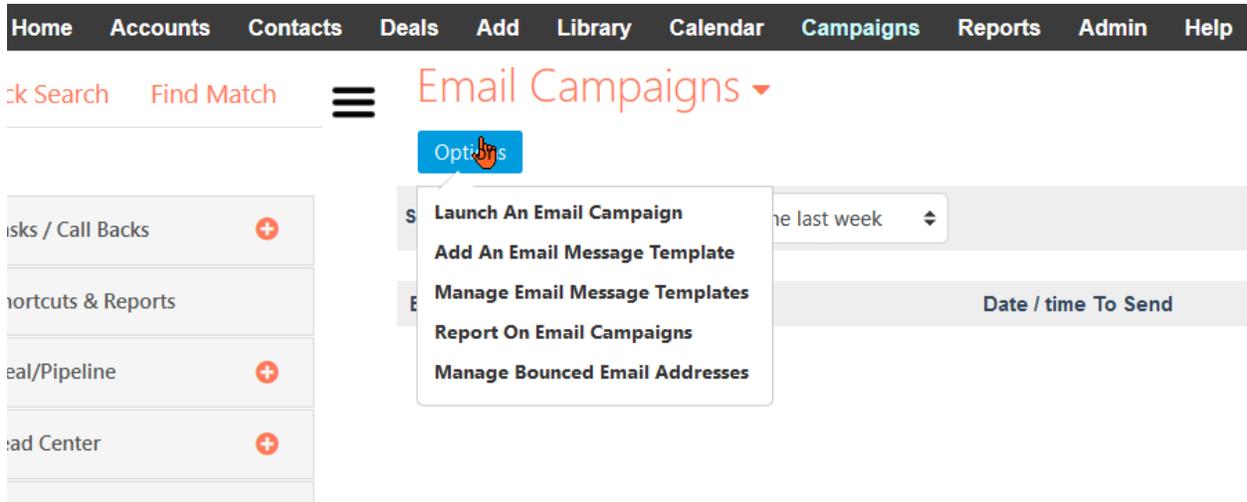
Launch An Email Campaign
This allows you to create a new Email Campaign.

Add an Email Message Template
This allows you to create a new Email Template which can be used for sending emails from various places in the application.

Manage Email Message Templates
Brings you to a list of all Email Templates (Including the system's sample templates – 'Save As') where you can Add, Edit, or Delete your Email Templates.

Report On Email Campaigns
Allows you to see various reports on specific Email Campaigns, such as who has Opened the email and who has chosen to Opt-Out of emails.

Manage Bounced Email Addresses
This gives you a list of those emails which have bounced when the system attempted to email the contact, so you may take further action such as calling.

Launch an Email Campaign

Either by choosing "Add an Email Campaign" from the banner menu, or selecting "Launch an Email Campaign from the option menu, allows you to begin creating an Email Campaign from the following screen.

From here, it is as simple as reading and following the steps from top to bottom.

Step 1 - Name your Campaign – Choose something specific enough that you know what the email is, and perhaps to whom it is being sent.

Step 2 - Choose who will receive your email. To avoid being considered spam by email servers, your database is limited by Monthly, Daily, and Per Search amounts. If you need this limit increased, please talk to your LeadMaster Representative overseeing your account.

To select your contacts, choose either the "Search Contacts" or "Search Records" radio buttons. This depends on which data you need to search for. For example: If you need to send to specific Contact Titles/Positions, search contacts. If you need to send to specific Record Statuses search Records.

Click the blue "Select Contacts/Records" button to bring up a search screen where you may specify which contacts will receive this email. If your search contains more than your allotted Search Limit, you will need to further limit the search (perhaps into specific Locations/States), and send the email over multiple campaigns.

Step 3 - Choose when to send the email. You can send it "Now" or at a "Later" date specified within the date and time fields.

Step 4 - You may now choose the Email Template you wish to use (Or you may choose no template, and Manually create the email in the next section). Click "Select Email Message Template" to open a window with a list of all your already-created templates. To use a template, select the blue "Check mark" next to your template.
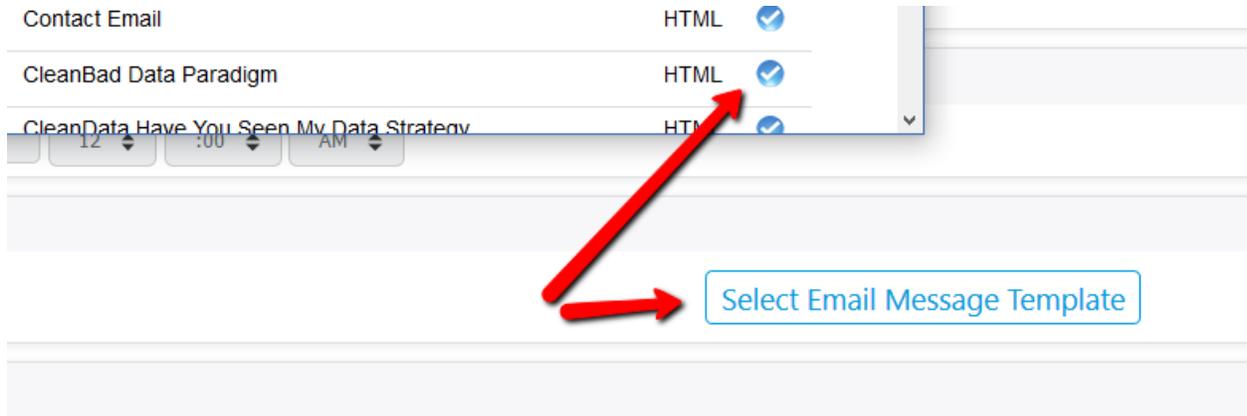
Step 5 - After selecting the Template (Or choosing to manually create the email here), notice that the template's details are now in the "Your Message" Section. From here you can specify several email options

To – Is the receiver of the email message. This is blank and will be filled in by the system based upon your search criteria. Recipients will only see their name / email. They will not see the list of people you've sent this email to.
From Name – Who the message is coming from (e.g. your name or department).
From Email Address – The Email address you want the message to appear from. This is a dropdown selection of your verified email addresses.
Reply Email Address – This is the Email Address you want replies to be sent to. This is a dropdown selection of your verified email addresses.
Insert Merge Field – This is a dropdown of the system fields you want to insert into the Email Subject. For example, instead of general "Hi," You may choose to insert "Hi [Contact First Name]" to give more personal email subjects.
Format – This lets you choose if you want plain text, or HTML formatted emails
Insert Merge Field – The same as above, except places the field into the body/message of the email.
Insert Custom Form – This allows you to insert a link to one of your custom forms into the body/message of the email.

Message – This is where you have your main body/message of the email.

Step 6 - In this next section you have your "Signature." You can choose to include your accounts email signature (Specified in your User Settings), and you are required to enter your business information into the fields.

Step 7 - The "Final Options" section allows you to send a quick test to your specified email address. ****Please Note**** this test is pre-merge field and will send the email without personalization. It is instead recommended to set your email address in a Business Record in the system, and include yourself on this email campaign to truly see the Email Campaign from your receiver's view.

IF you are concerned about the way your email looks in different email clients (Outlook, Gmail, AppleMail etc) it is recommended that you send an email campaign to your email addresses for the clients you want to preview your email message.

Step 8 - The Final step is to send/save/submit your Email Campaign. You have a checkbox to either Log the email in the Contact's "Email/Marketing History" or not include it. Logging in the Contact's email history will allow you to see the emails you've sent and the actions the recipients have taken (opens / clicks) in the email history section of the contacts. You do not need to log in the Contact's Email History in order to have the Opens / Clicks register in the Email Marketing Reporting.

Please Note If your database/user Email Limits are surpassed in this Email Campaign you will only see a Cancel Button, instead of a "Save/Send/Submit" option. Reach out to your company's admin or LeadMaster Consultant for permission or limit increases.