Group mailings

Fix Me! A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the forum.

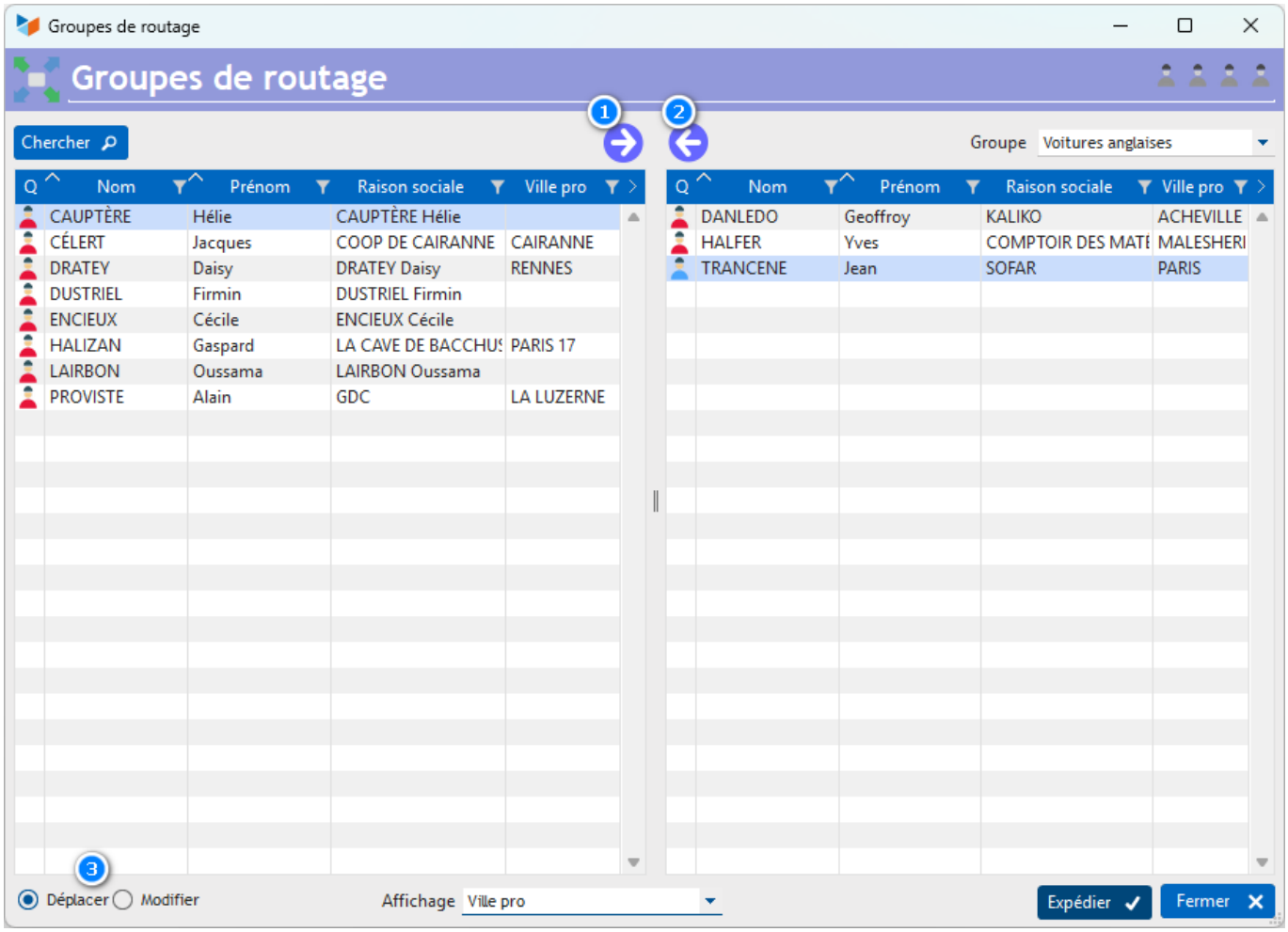
The principle is as follows:

- you create a routing group made up of a subset of your contacts;
- for the group, you trigger the mailing, evening for an e-mailing, or for a paper mailing.

Using the screen

Managing routing groups

Access: *Contacts ? Commercial Action ? Manage routing groups*.



This screen allows you to assign contacts to a routing group. The 1 and 2 buttons allow you to add or remove the selected contacts from the selected group via the **Group** combo.

The 3 selector controls the action of double-clicking on the line: either **modify** the contact, or **move** it in the group. The display combo allows you to display additional areas of contact data, in order to

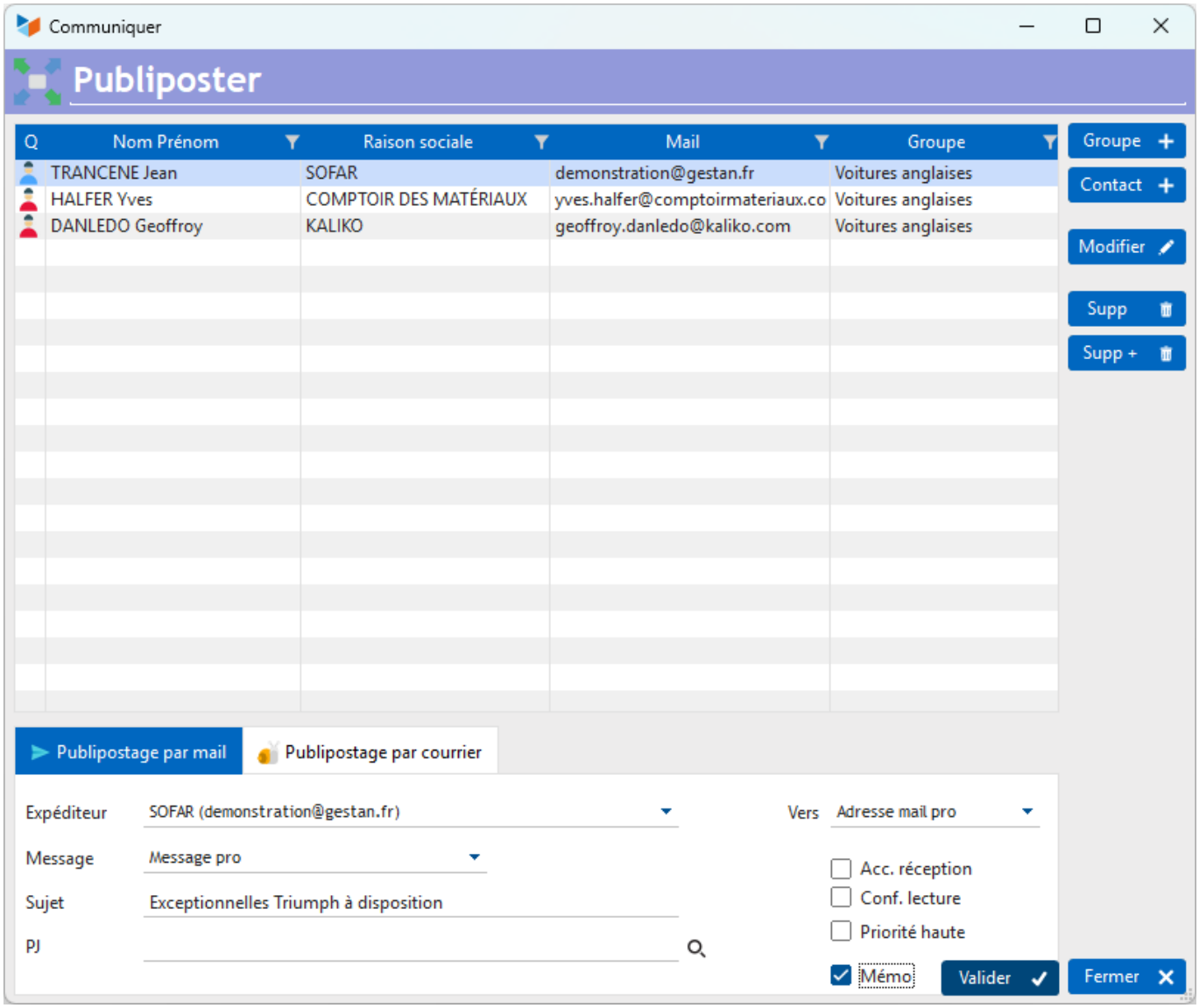
facilitate their selection. For example, if you want all the contacts in a department, display the professional postal code, sort the results by this column, and select all the contacts in the department.

It is possible to assign a contact to a routing group via the Other info tab of the contact card.

The **Ship** button opens the mail merge screen.

Group mailing

Access: *Contacts ? Commercial Action ? E-mailing and direct mailing*.

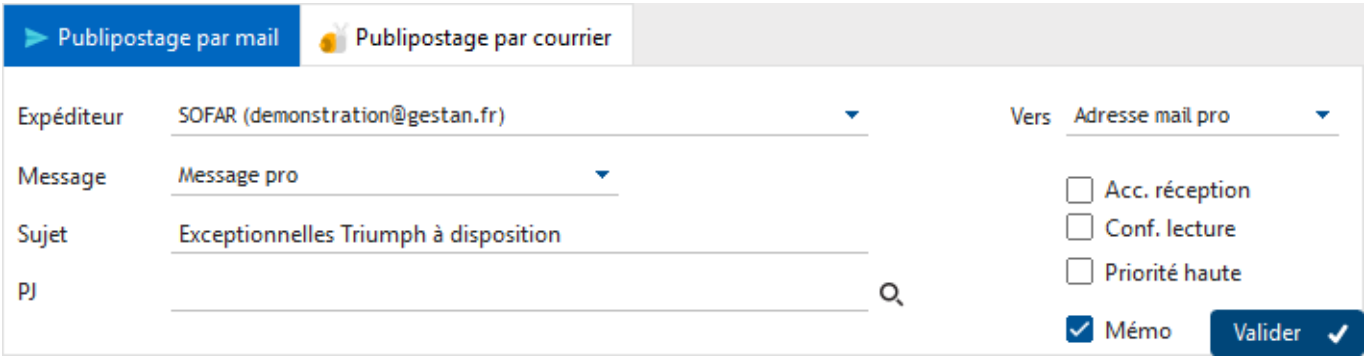


You can add recipients to the sending, either already existing routing **groups** or **contacts** individually. You can delete a recipient from the sending (**Delete** button), or delete them from the group and from the sending at the same time (**Delete** button).

The context menu of the table allows you to **geolocate** the selected elements.

The lower part of the screen allows you to select the campaign method, either an email or a letter.

Sending by email



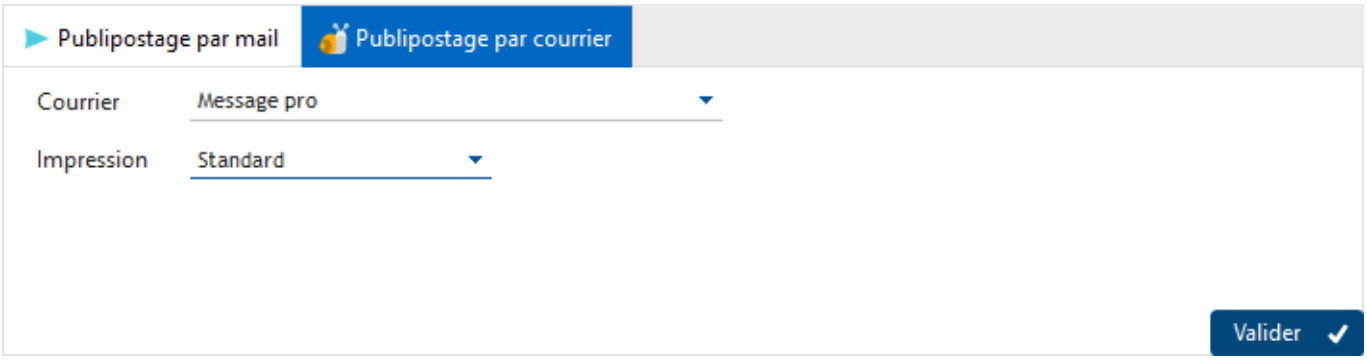
The tab allows you to define the characteristics of the e-mailing:

- The sender
- The standard message, whether it is previously recorded in the standard messages, or whether it is a one-off message written for the occasion (“Special one-shot” option)
- the subject of the message
- any attachments
- the target email to take into account for the group (combo **To**)

If the **Memo** box is checked, the sent email will be stored in the contact's Actions folder.

The **Validate** button triggers the e-mailing. A sending tracking screen is displayed: you can continue working while the mailing is carried out in parallel.

Sending by mail



The tab allows you to define the characteristics of the mailing:

- the standard letter to send, what must be recorded in the standard letters
- the type of printing requested: standard (i.e. the complete standard mail), pre-printed (the direct mail will be printed on pre-printed paper), or addresses only.

The **Validate** button triggers the generation of the mailing file.

Other Contacts articles

Children
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Enabling the feature
Geographical allocation of contacts
Geographical assignment of contacts
Group mailings
List of memberships
Mail merges
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