

MDS Quick Guide – CRM Blast Email

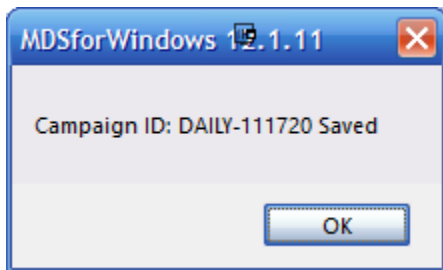
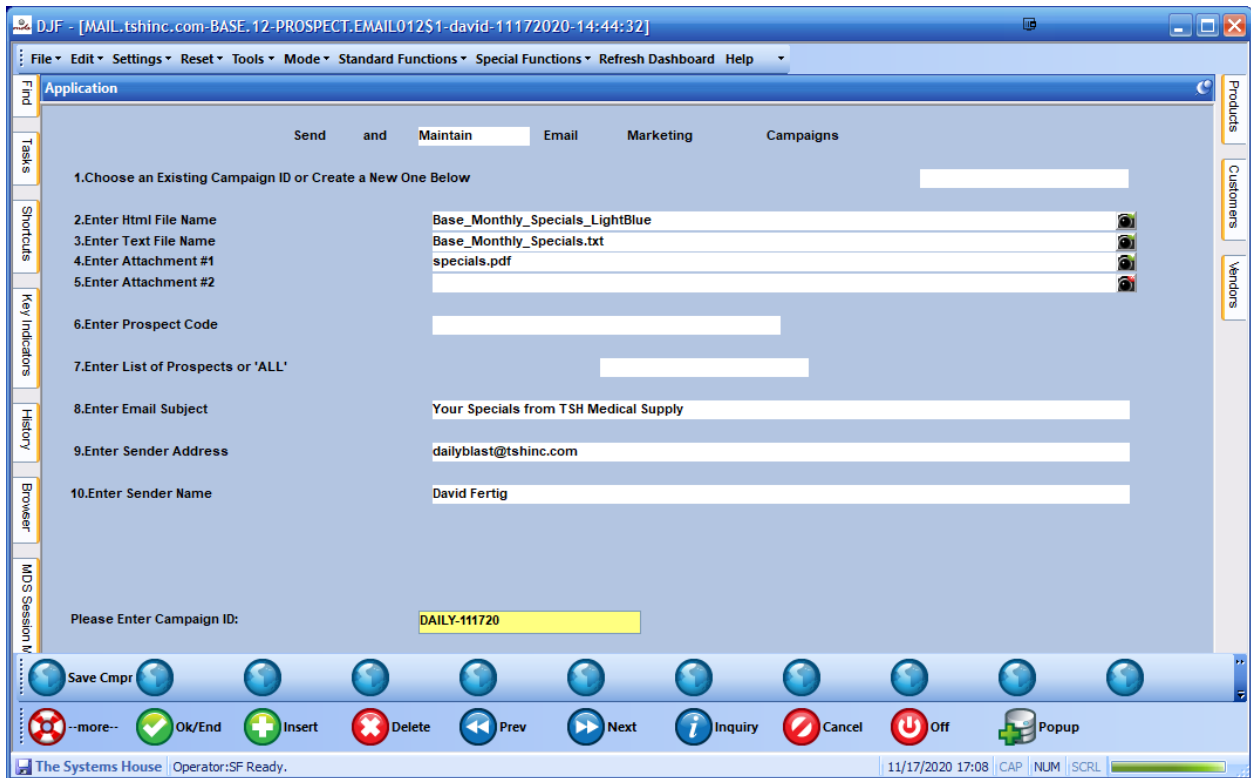
V 1.1 updated 11/18/20

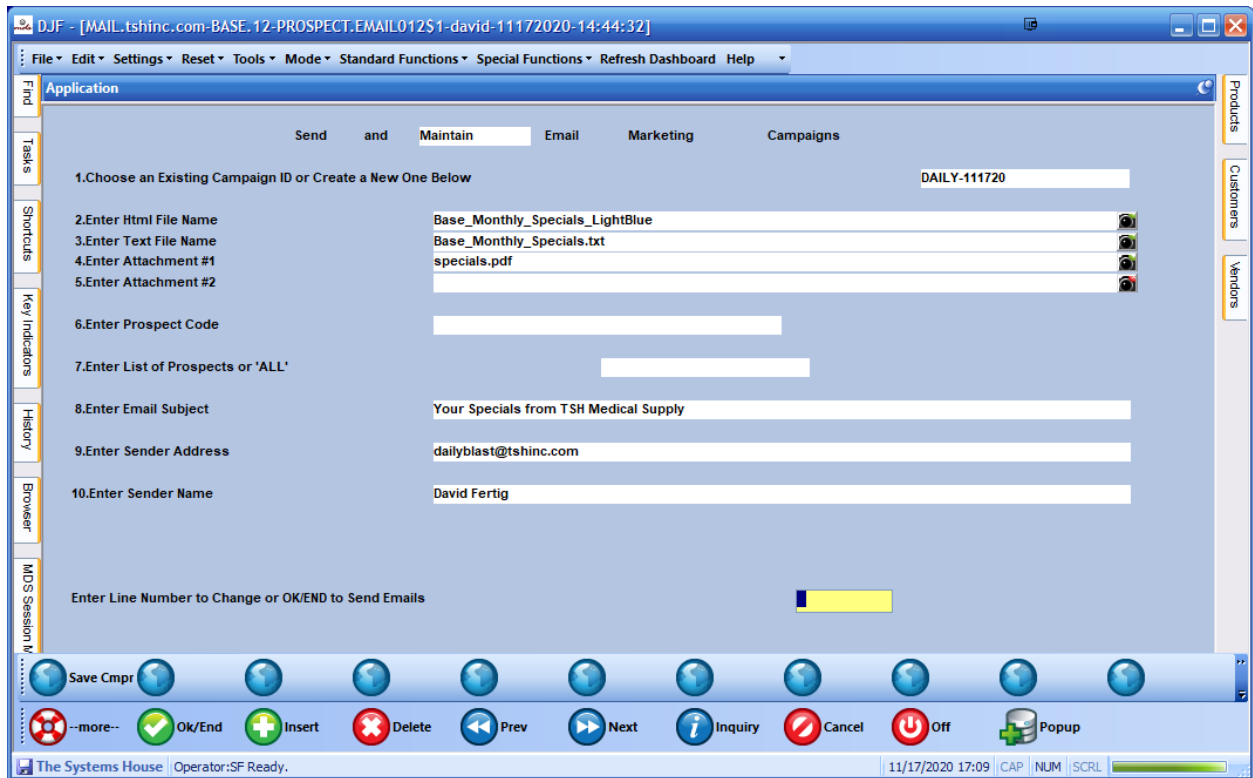
Overview:

This quick guide will walk you through the basic steps of setting up and sending a CRM Blast email to prospects and or customers. The content of your blast email is up to you. However, we include options for a default template in the standard setup. Alternately you can import and use your own HTML email templates. In addition, our blast email offers the option to include a pdf or other files as an attachment.

For the purposes of this quick guide we will assume you have your prospects and customers setup in your MDS system.

Note *sending emails to existing customers and or prospects is generally not an issue to but to prevent your account from being tagged as spam , you should not send out excessive amounts of email and if you are looking for a more automated system we typically recommend looking at the MDS Automated Social Media Option.*





Note when creating your template you can use any standard html editor

The following fields are available to be inserted into your templates for customization and tracking.

[TITLE] – Title from the prospect screens.

[COMPANY] – Prospect Company name

[CITY.SZ] – Prospect City State and Zip

[ADDRESS] – Prospect Address

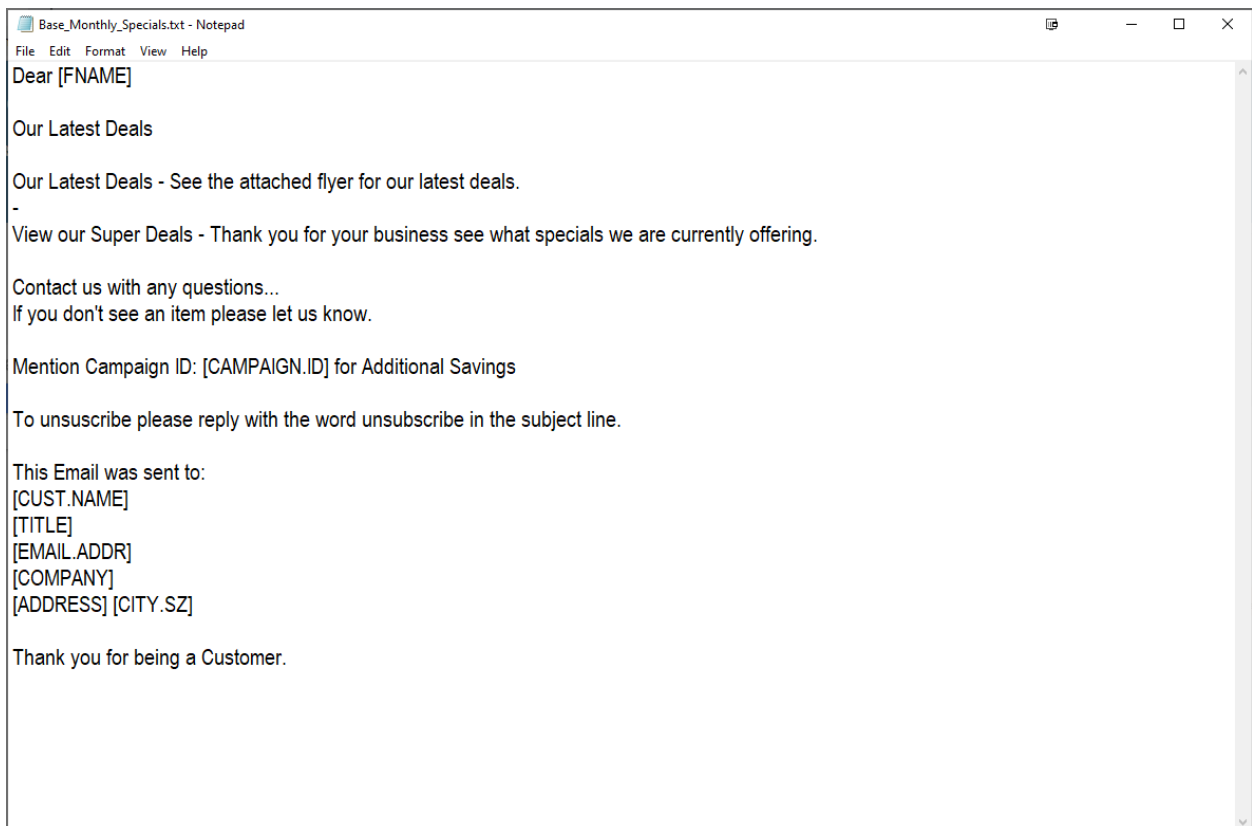
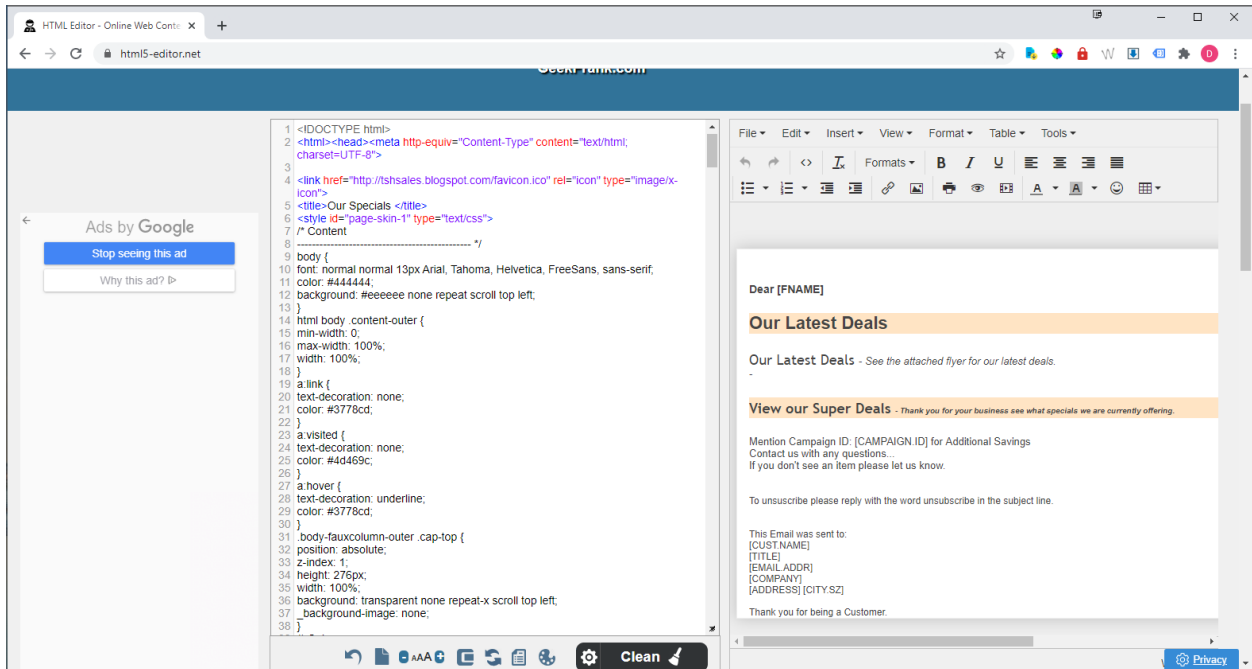
[FNAME] – Prospect Contact First Name

[CUST.NAME] – Prospect Contact Name

[EMAIL.ADDR] – Prospect Email Adress

[CAMPAIGN.ID] – Campaign ID for Email Blast

Below is an Example online html editor to create or edit your html emails and text emails



Step 2. Test and Send your blast email campaign.

Login online or using the MDS-Nx Windows client and select a sample prospect, in our example we used prospect DEMO. The prospect CODE is in the Customer/Prospect Number field below on the web, or the Prospect# field on the MDS-Nx client.

Remotenet CRM - Daily Call and Contact List

Initial Calls:	Daily:	1	Weekly:	0	Monthly:	2	Yearly:	1
Total Calls:	Daily:	27	Weekly:	0	Monthly:	29	Yearly:	27
DL PHONE:	Daily:	25	Weekly:	0	Monthly:	27	Yearly:	25
EM EMAIL:	Daily:	1	Weekly:	0	Monthly:	1	Yearly:	1
FF FACE TO FACE:	Daily:	1	Weekly:	0	Monthly:	1	Yearly:	1

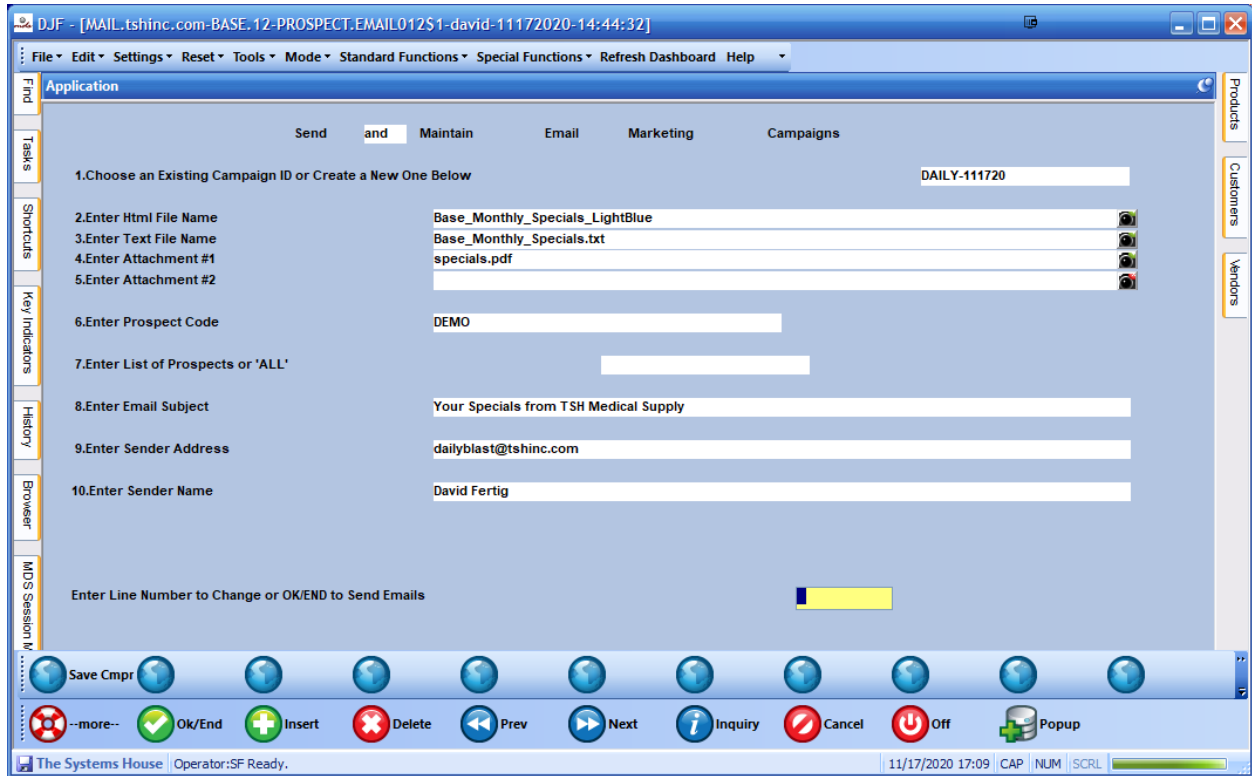
Refresh Universal Search

Salesman Activity and Notes Filter Last Note Date to Filter Follow Up Date to Search:

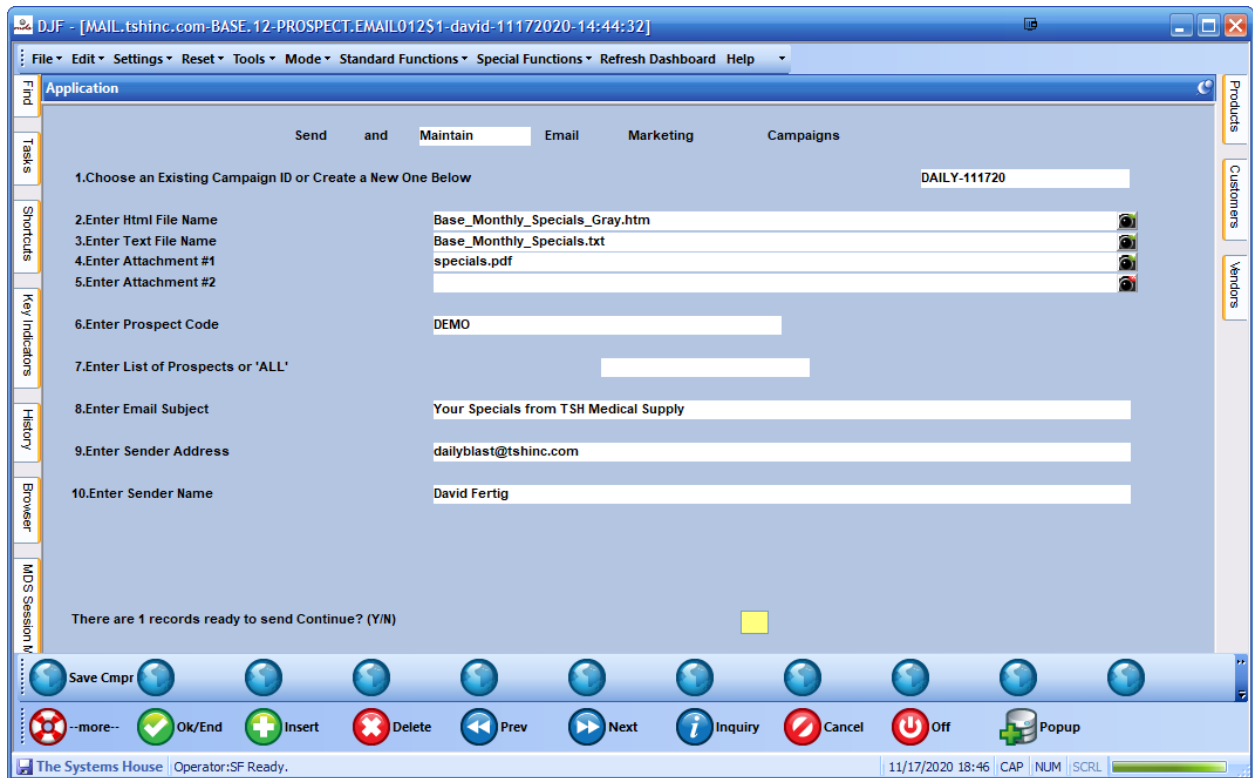
Copy CSV Excel Print

Customer Prospect Number	Salesman	Account Status	Customer Prospect Information (CPI)	City	State	Last Note Date	Status	Follow up Date	Business Class	Lead Source	Next Step	Custom Fields
003453	960 Lori	Prospect	2157 CENTURY FOODS JACK HARRIS 516-333-2626 @tshinc.com www.dqr8.com	JERICHO	NY	03/06/2007	NEW	07/19/2007	OEM	Lead Source List AAA	Call Back	PC based 20 00000000
003453	003 Larry Meran	Prospect	David DAVID FERIG 973-777-8650 DF@TSHINC.COM www.tshinc.com	CLIFTON	NJ		CUSTOMER	05/16/2014	OEM	Lead Source List AAA	Call Back	
003453	001 Fred Smith	Prospect	Demo Customer David Ferig 973-777-8650 DF@TSHINC.COM www.TSHINC.COM	Clifton	NJ	06/28/2019	CUSTOMER	06/28/2019	OEM	Lead Source List AAA	Call Back	
EN000001	111 David Ferig	Prospect	Endo Surg Medical Cmg 3045 931-389-2686 @tshinc.com	Columbia	TN	05/12/2008	DISQUALIFY	07/17/2019	OEM	Lead Source List AAA	Call Back	0 Medical Supplies

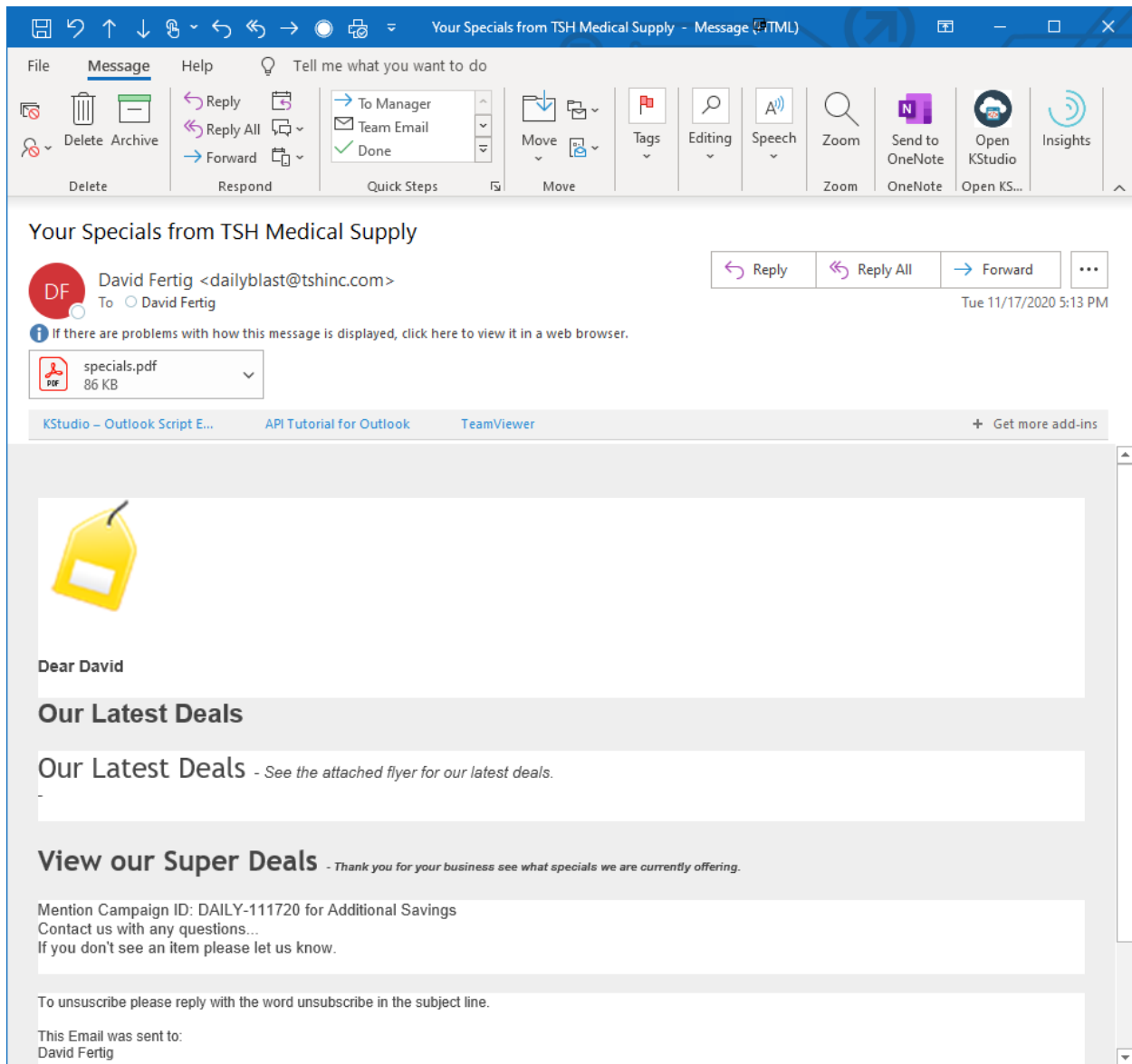
Go back into the blast email , choose your campaign from the drop down, and then Choose a prospect to send a test blast.



Once run the blast it will tell you total number of records to send ..



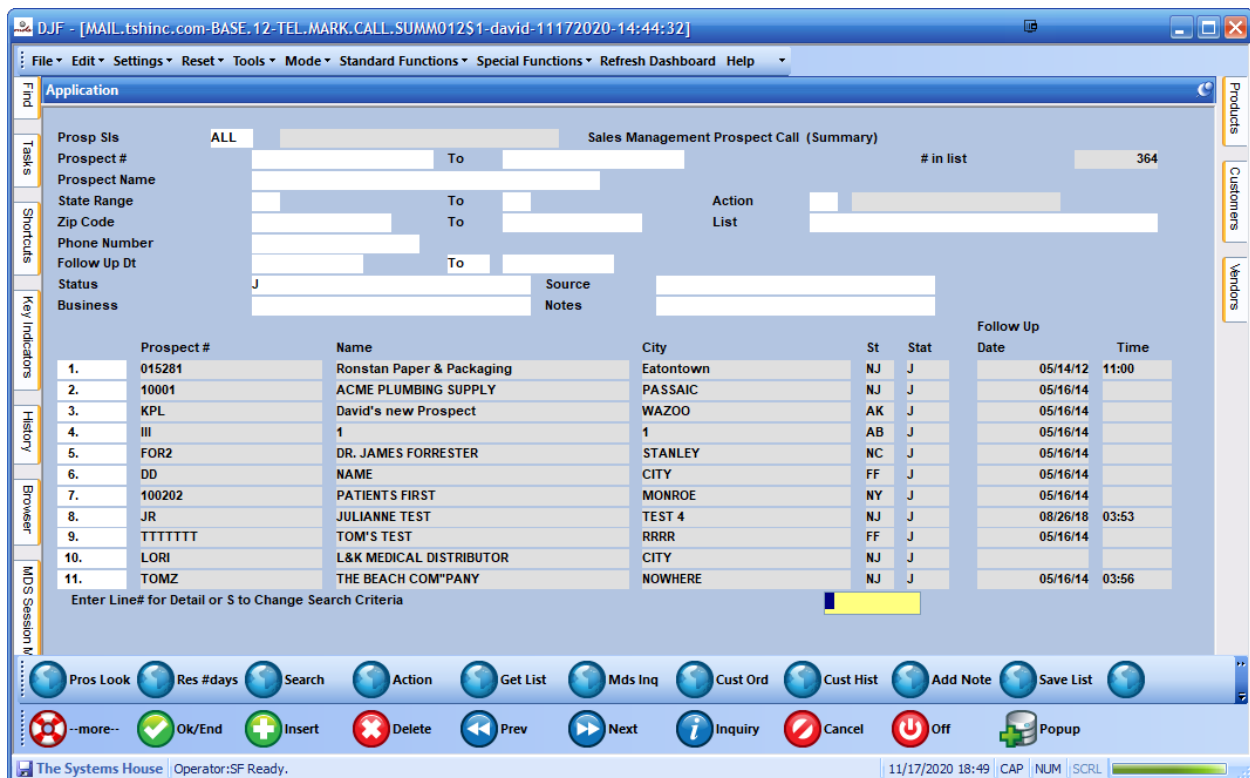
After you say yes it will display the names and emails as it sends. Then check your email and make sure all looks good.



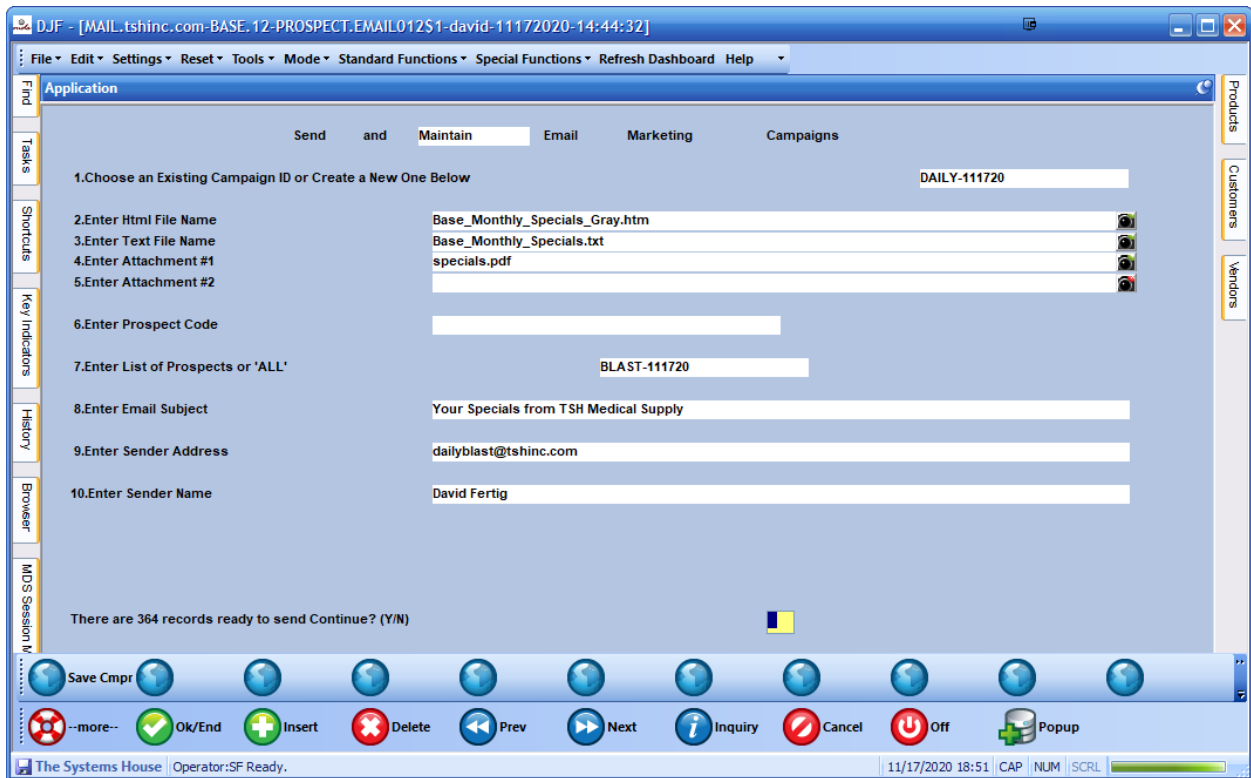
Step 3. Creating a list and sending your blast.

To create a list, you can use a select list created by TSH support or you can create your own using prospect call selection.

In our example I filtered by status code, but you can create your list using whatever criteria you want.



Then click the save list button to save your list for your blast email in our example I created list BLAST-111720 for my 364 customers.



Then click ok and send your emails.