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.

Step 1. Creating your blast email campaign.

Each email blast can be uniquely identified with a campaign ID or code. To create a new campaign just hit enter and add your information. You can choose from the library of existing templates or upload your own using the camera.

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To create the campaign you will need a html template, a text template and an attachment (optionally) Since many phones, mobile devices and or older email systems don't allow for html emails or block images, we recommend you create two email versions. The text version is simple text version of the email you are sending typically.

Fill in your Email subject and sender address/name as needed. And click the Save Cmpr button (shift f1) You can skip the prospect code and list of prospects for now, we will fill those in when sending.

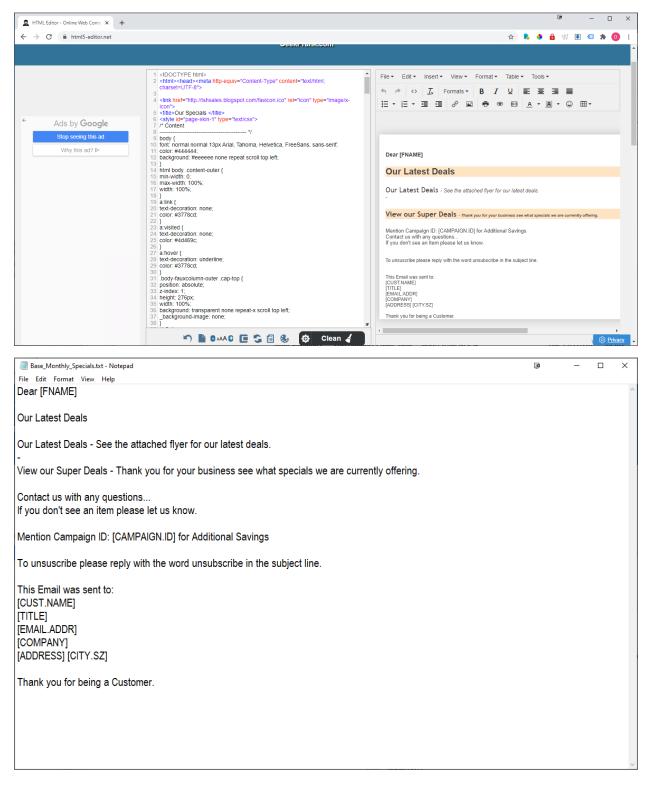
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Note when creating your template you can use any standard html editor

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 out 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.

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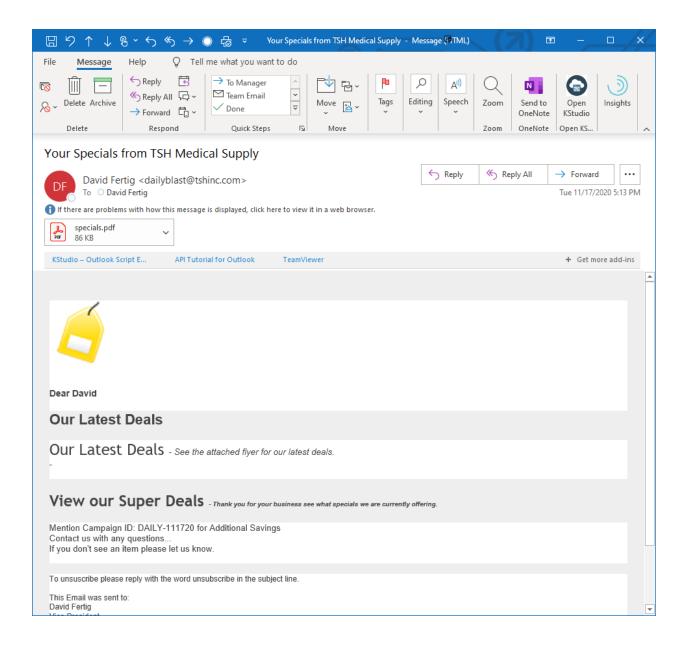
Go back into the blast email , choose your campaign from the drop down, and then Choose a prospect to send a test blast.

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

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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.

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Then click ok and send your emails.