

Emailing Clients

Steps

To email your client base, click the **Email Client Base** link in the *Client Manager Dashboard*. The resulting *Email Client Base* window will have the following configuration options to choose from:

All Clients

Email every client in your database.

With a Balance

Allows you to send email out to clients with a balance equal to, greater than, or less than a specified amount.

With Invoices _____ Days Overdue

Allows you to send email to clients with invoices overdue for the specified number of days.

With _____ Services

Allows you to email clients based on the number of services they have.

With the Service Plan _____

Allows you to send out email to clients with a specific service plan.

Mailing List

Allows you send out email to clients on a specific mailing list.

Once you have selected the group which you would like to send emails to, click **Compose Email**. The resulting popup will allow you to enter the message you would like to send to the selected clients. Clicking **Send** will start the mass email process. **Send & New** will send the current message and allow you to compose another. **Back** will allow you to review / modify the clients being emailed. **Cancel** will discard your work, and no clients will be emailed.

The **View Status** button will allow you to view the progress of messages previously sent to your client base, as well as those currently in progress.

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