

Instructions for Sending Email to Multiple Customers

Broadcasting Email using Microsoft Outlook

(note: This is just one technique --- there are other methods to broadcast email messages)

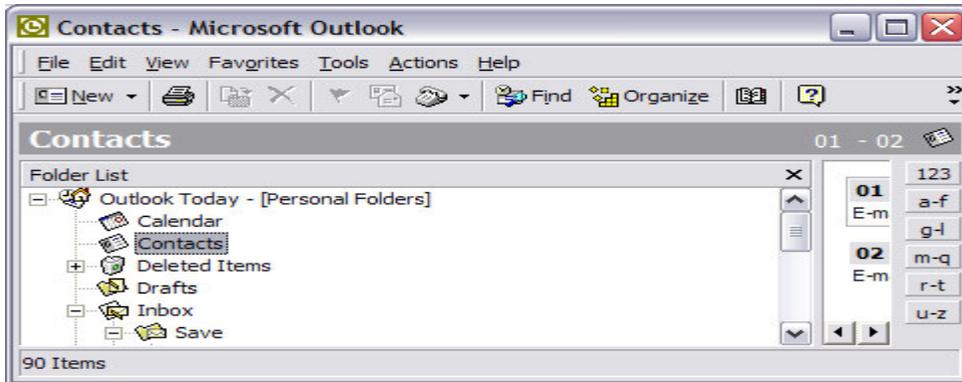
Preparation Phase (this should need to be done just 1 time)

Prep Phase (do just once):

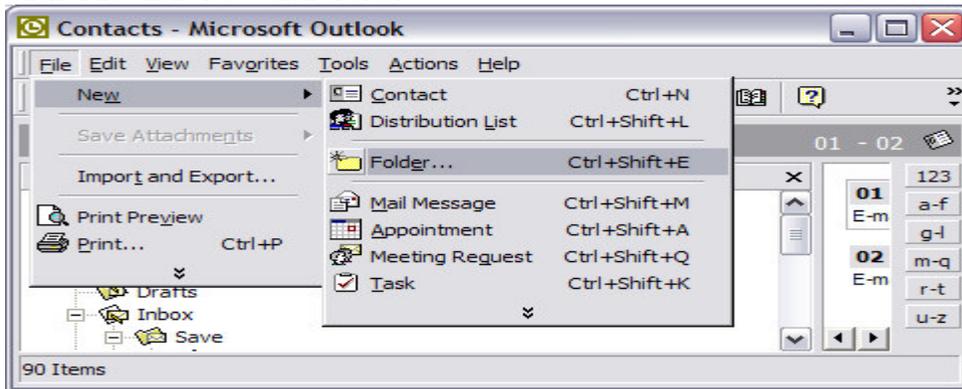
Open Microsoft Outlook

We need to create a subfolder under “Contacts” that will be used to store the email addresses that we download from your 1on1 Sales Tool (we need a separate folder so that we do not combine these contacts with your other contacts in MS Outlook).

Click on “Contacts”

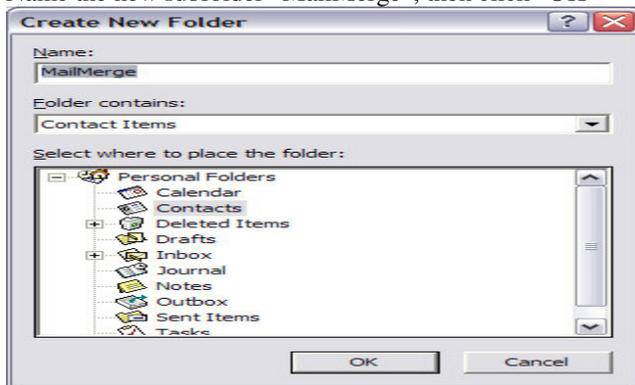


Click “File” then “New” then “Folder”

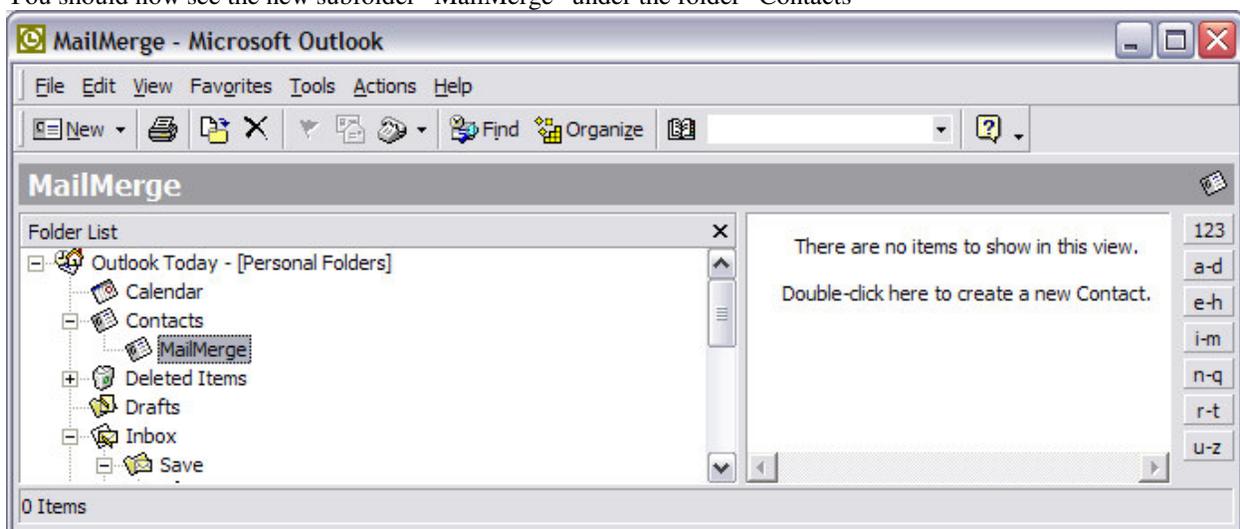


Prep Phase (do just once):

Name the new subfolder “MailMerge”, then click “OK”



You should now see the new subfolder “MailMerge” under the folder “Contacts”



You will understand the importance of the “MailMerge” subfolder later, but in a nutshell, it will be used like a chalkboard: the data will be imported then merged with an email message. After the message has been sent, the addresses can be deleted and a new set of email addresses can be downloaded and merged with an email message.

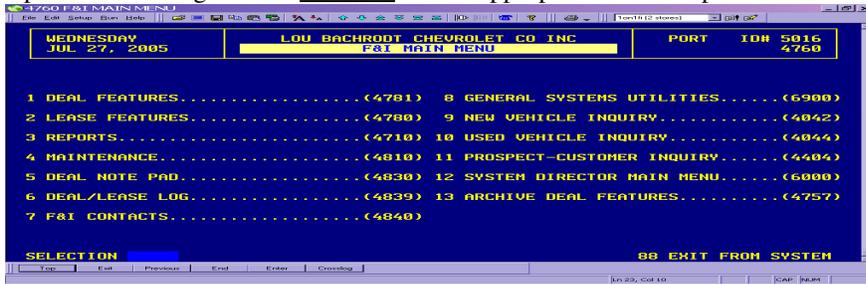
When you want to send emails to a large group of people, you will first delete all of the email addresses in the subfolder “MailMerge” (be careful not to delete the folder itself, however).

Then you will import the email addresses from your 1on1 Sales Tool (this step is below).

After you have composed your email letter, you will select all of the customer in the subfolder “MailMerge” to receive your letter. **VERY IMPORTANT:** You should ALWAYS use the BCC field to add multiple recipients, otherwise you will be publishing your customers email addresses over the internet!!

Download Data Phase

Open ERA and log into the F&I area for the appropriate dealership.



If you have the QUERIES icons on your EraLink32 screen, then simply click the YELLOW pencil. If you do NOT have the QUERIES icons on your EraLink32 screen, then click RUN, then click QUERY BUILDER. Click OPEN, then choose the query that looks something like “1on1sls”.

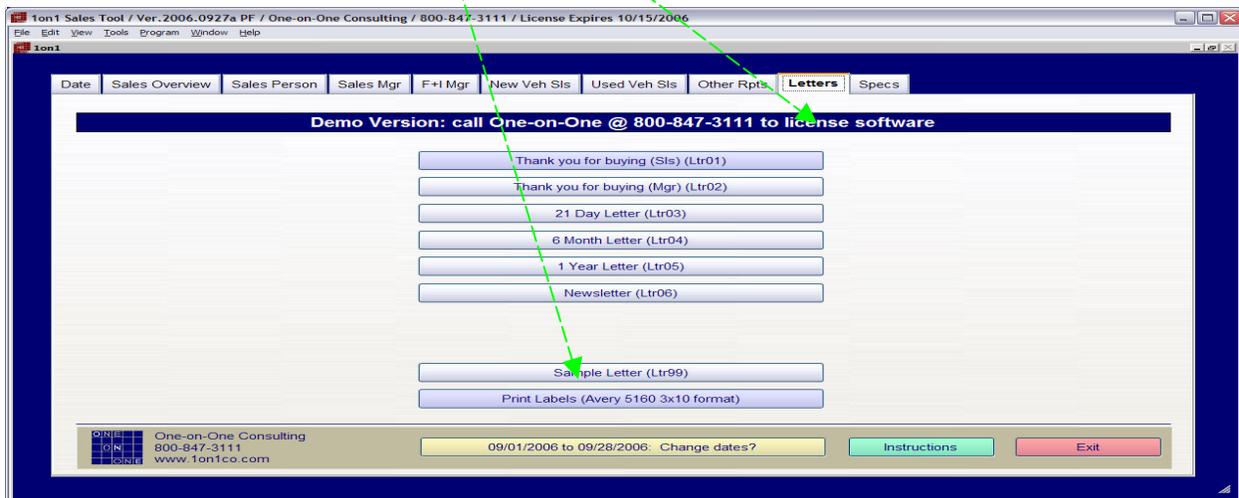


Change the date that appears in the “ITEMS” area, then click “OK” to begin downloading your data (you probably will NOT want to save the query builder file with the new date, since it will take longer to run your daily reports).

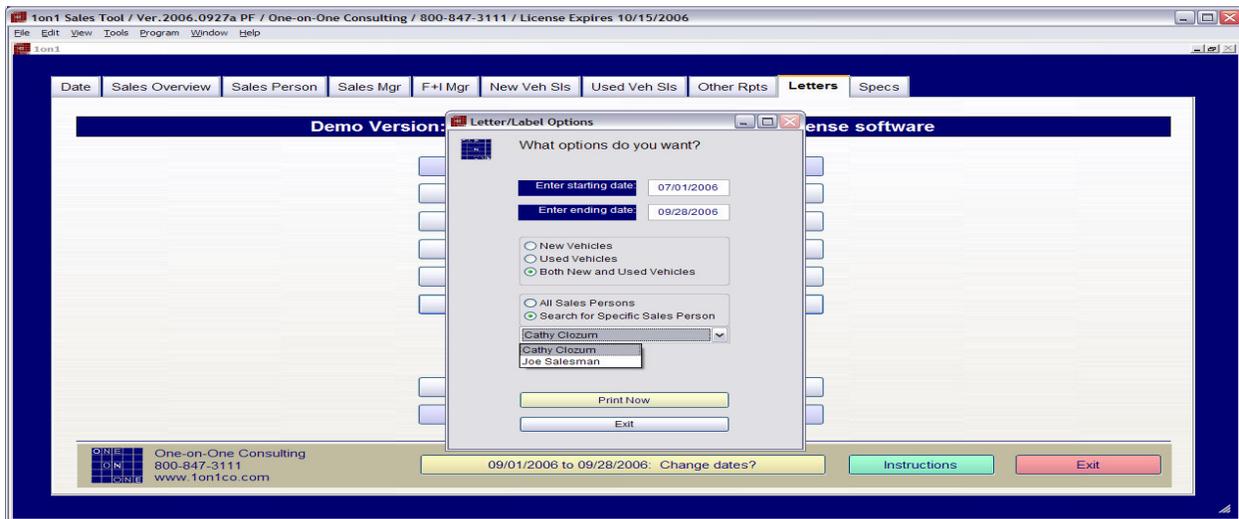
Minimize ERA after downloading the data (it normally takes between 15 seconds and 3 minutes, depending on the date that you chose. The earlier the date, the longer it will take since it is pulling more data).

“1on1 Sales Tool” Phase

Open the “1on1 Sales Tool” and click on the Letters tab, then click on the “Export Data for EMAIL” button.



Answer the prompts as you prefer (you will want to change your dates, and Search for Specific Sales Person) Click “Print Now” or “Go” to export your email addresses, based on your criteria.



The “1on1 Sales Tool” will automatically produce a summary report, along with a letter to send via the Post Office. In addition, you will notice that Microsoft Excel will open the file called “EmailData” (you will import this data into your Microsoft Outlook subfolder called “MailMerge” in just a few minutes).

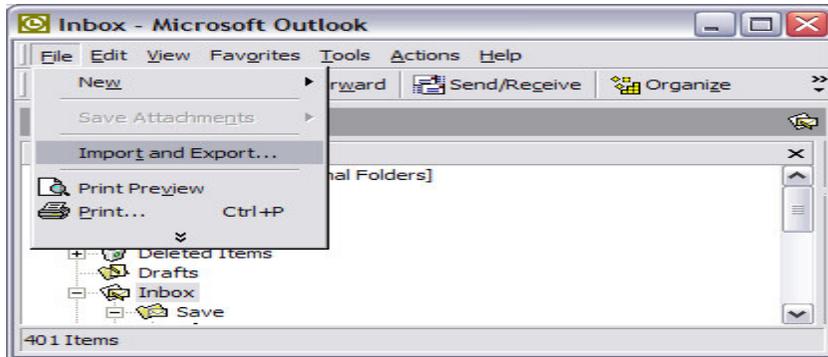
If you need to see the exported data file, it is located in the following folder:
“Shared Documents \ 1on1 \ Sales \ 1on1fi”

Minimize or close all other programs except for Microsoft Outlook.

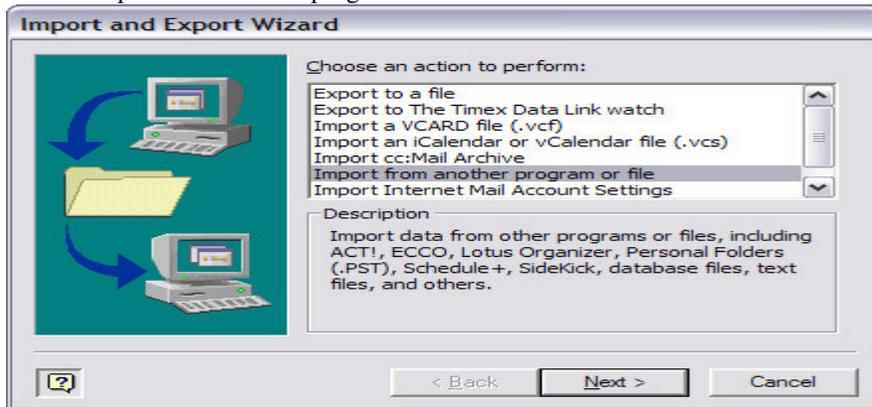
Microsoft Outlook : Gather Email Addresses Phase

Open Microsoft Outlook

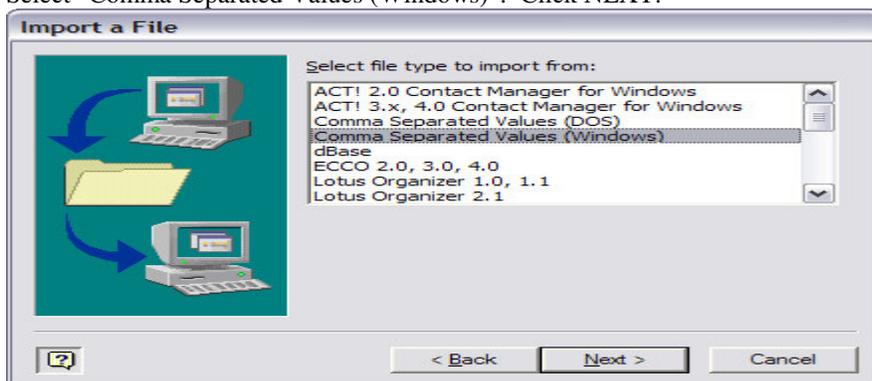
Click on “FILE” then “IMPORT and EXPORT”



Select “Import from another program or file”. Click NEXT.

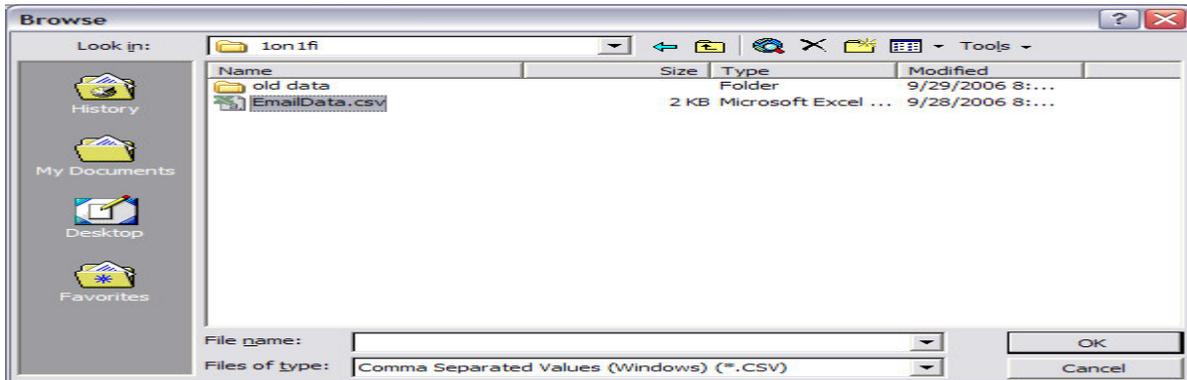


Select “Comma Separated Values (Windows)”. Click NEXT.

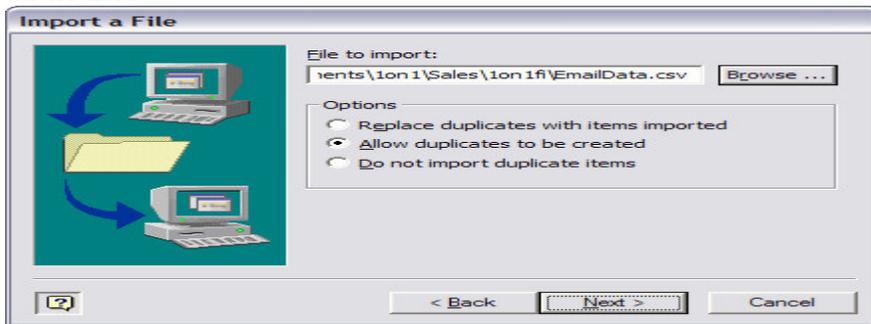


Click "BROWSE" then select the folder called:
"Shared Documents \ Ion1 \ Sales \ Ion1fi"

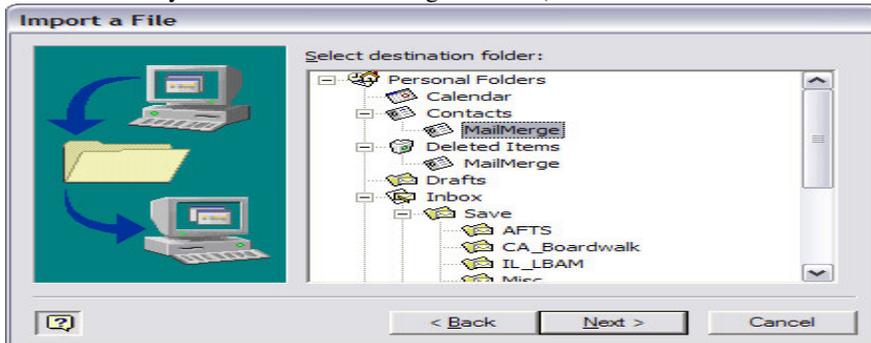
Select "EmailData.CSV". Click "OK".



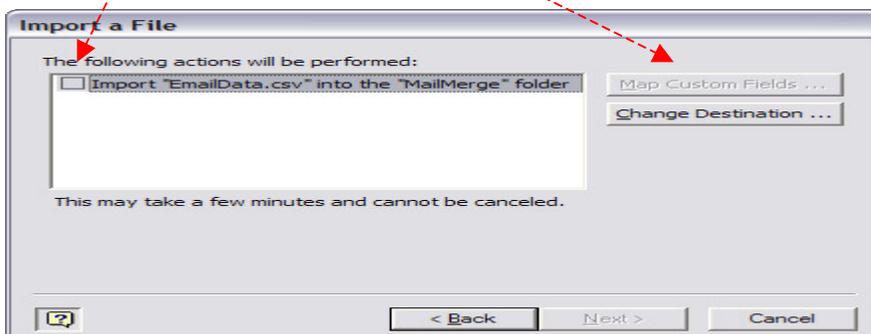
Click NEXT.



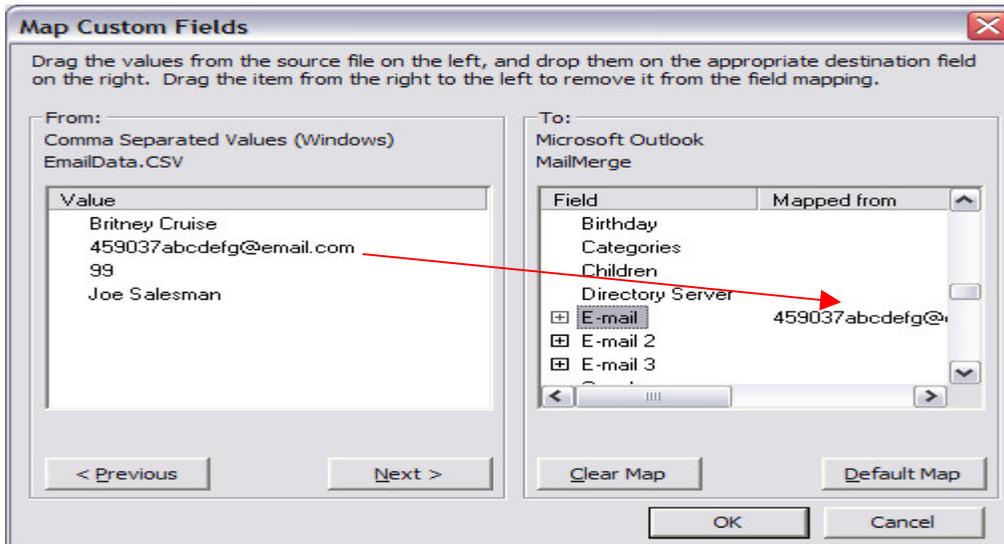
Make sure that you select the "MailMerge" folder (the subfolder under "Contacts")



Click the box, then click "Map Custom Fields" (it will activate after clicking the box)

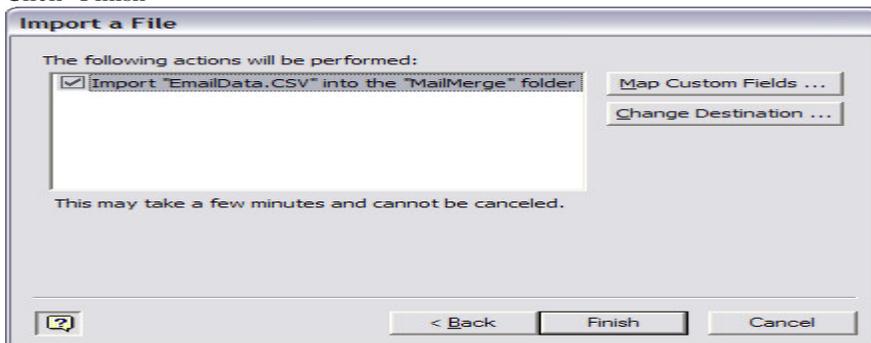


Map the customer's name and their email address by dragging and dropping.

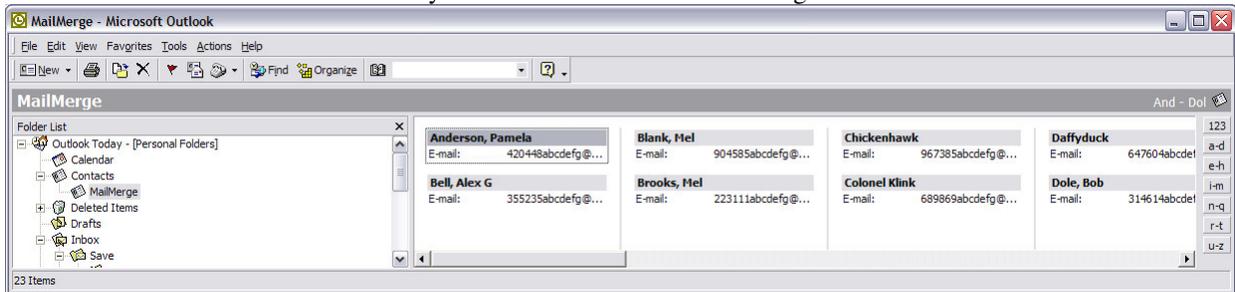


Click "OK"

Click "Finish"



Your email addresses are now stored in your Microsoft Outlook "MailMerge" folder.



Microsoft Outlook : Compose Email Message Phase

- Compose your letter in Microsoft Outlook as you normally would for an individual email message (Click INBOX then click NEW or COMPOSE MESSAGE).
- If you have a letter that you want to use, and it is in an electronic format, simply copy and paste the letter into the body of the email message.
- After composing the letter, click the “TO” or the “CC” button.
- Click the pulldown next to the prompt that says “SELECT NAMES FROM THE. . .”
- Select the “MailMerge” folder.
- The first email address should already be highlighted, so scroll down to the last email address.
- Hold the SHIFT key on your keyboard and click the last email address once (all email addresses should now be highlighted).
- Click “BCC” (Blank Carbon Copy). VERY IMPORTANT: You should ALWAYS use the BCC field for multiple recipients, otherwise you will be publishing your customers email addresses over the internet!! That would be bad.
- You may want to delete the contacts in the “MailMerge” folder AFTER sending the email to your contacts in the “MailMerge” folder.

All Done.