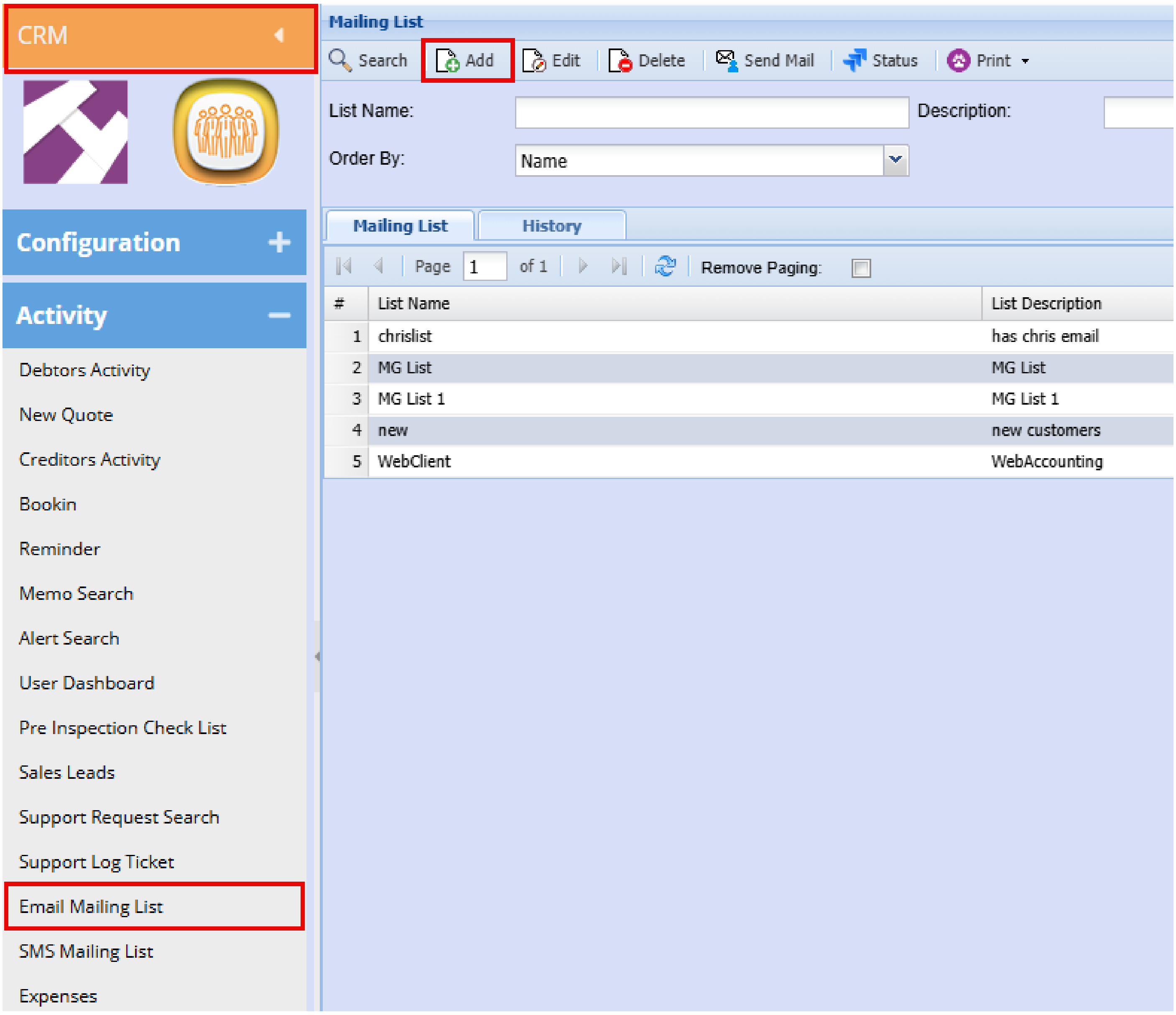
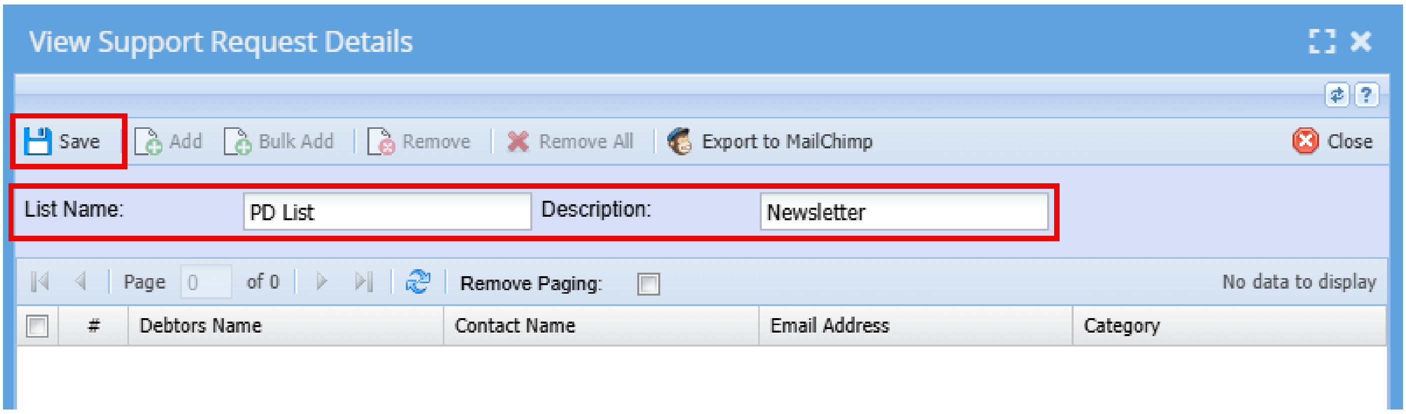
Creating Debtors Email Mailing List

CRM Module> Activity> Email Mailing List

- Click "**Add**"

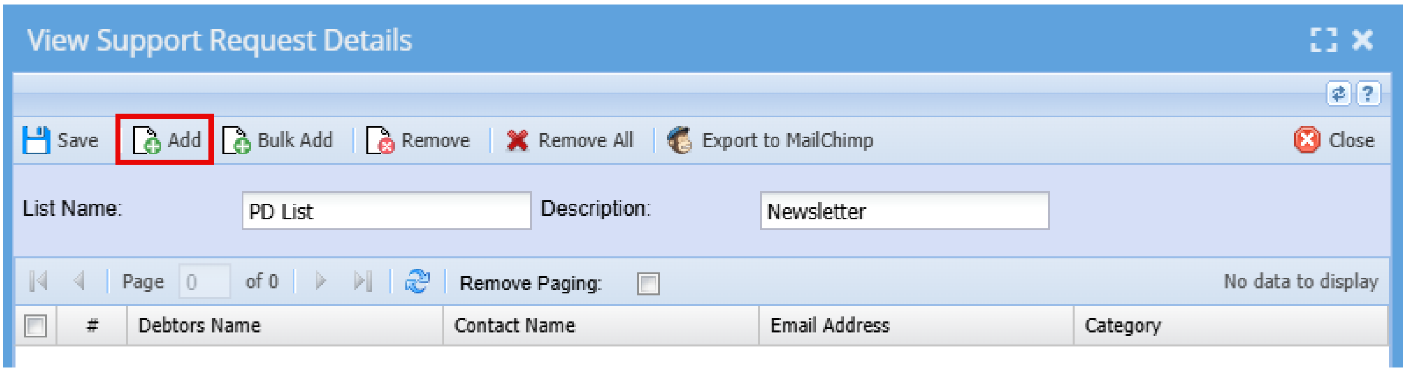


- Add the Mailing **List Name** and a **Description**
- Click "**Save**"

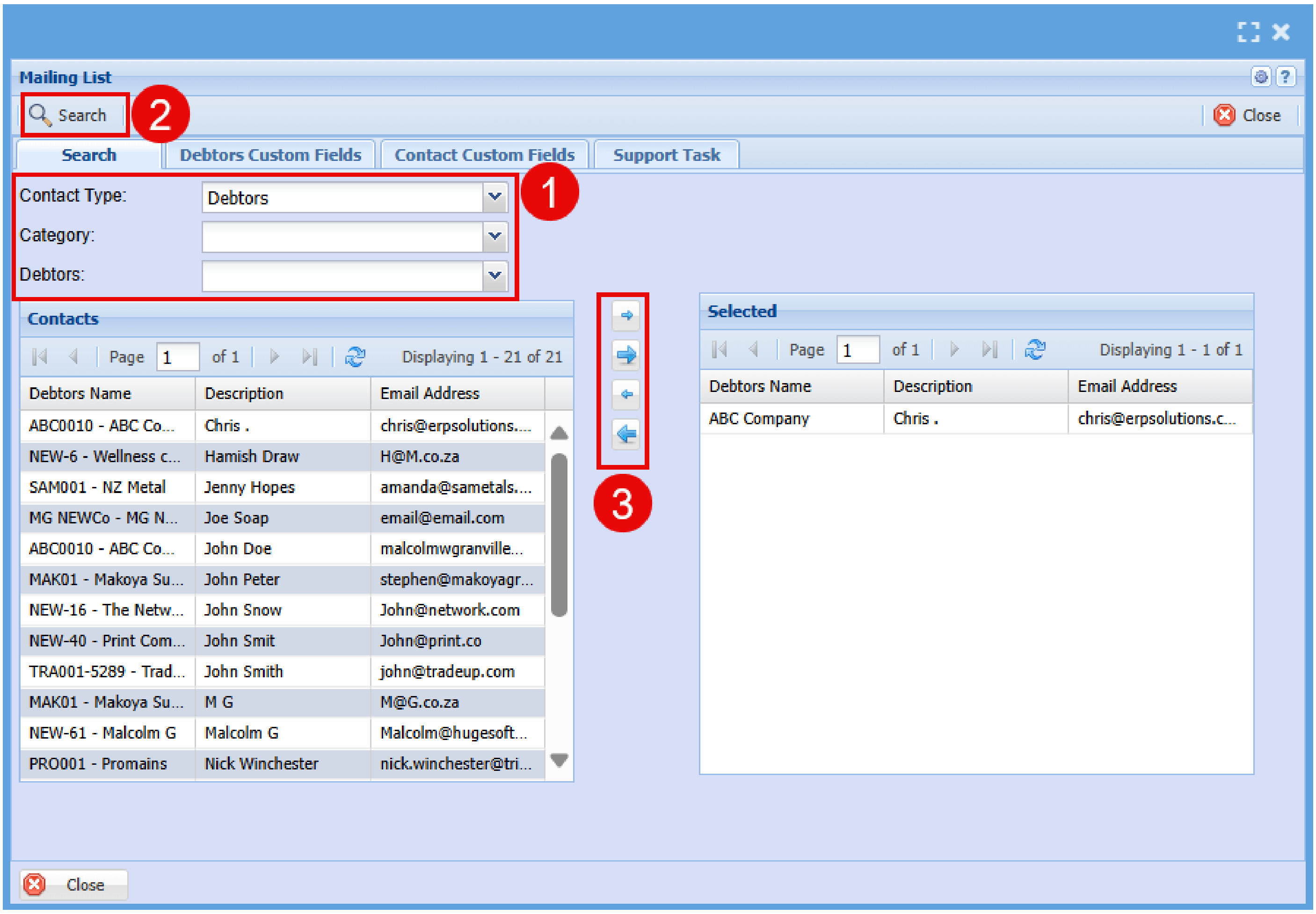


Click Save a new a window will open
Here you can start adding your contact for the mail.

- Click "**Add**"

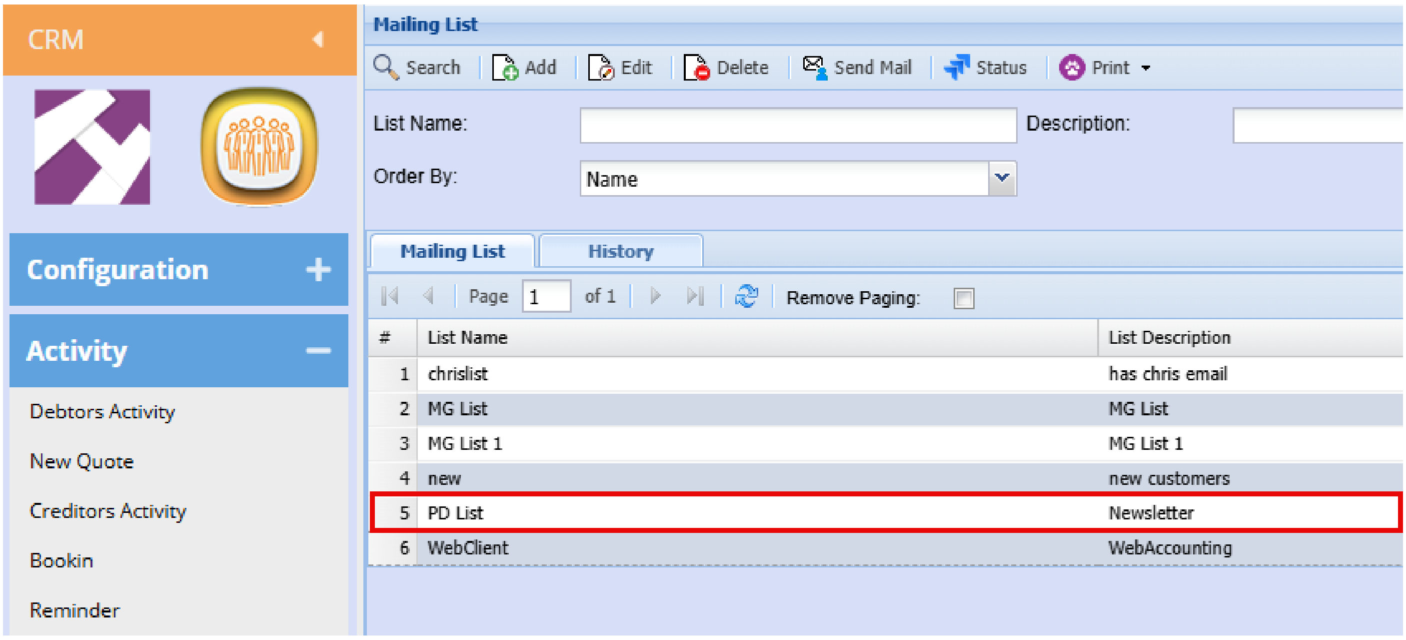


1. Use the filters to limit your search results
2. Click "**Search"** - The contacts grid will populate with Contacts
3. Either double click on the contact you want to add to the Selected column or use the Arrows to move these contacts over.
4. Click "**Close"** when you are happy with your list

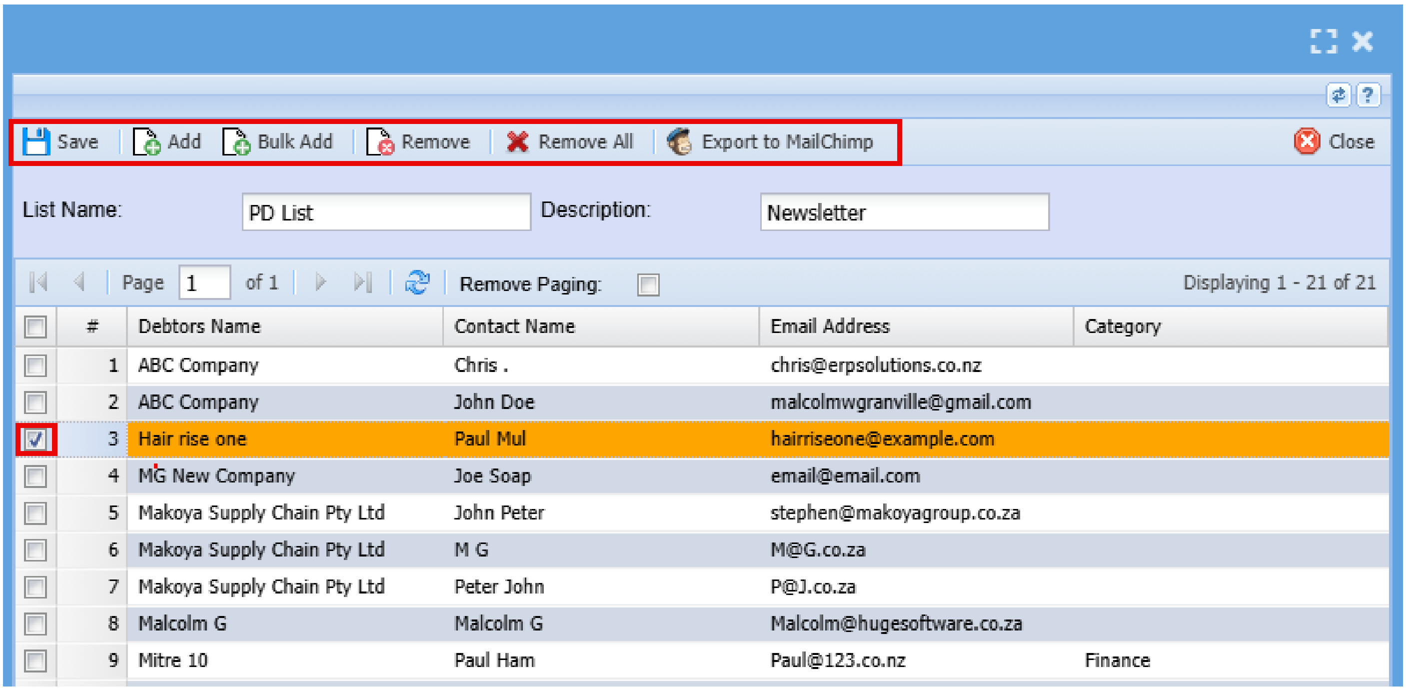


Contact Type	Select the Contact Type you wish to add contact from (Debtors, Prospects, Opportunities, Users, Employees) These may be different depending on what has been setup.
Category	Select the Category you would like to add contact from, these will also depend on what has been setup (Purchasing, Sales, Marketing, Finance, Executive)
Debtors	Select one debtor to add to your mailing list

When you click "**Close"**, you will see your mailing list that you created in the list and will be available for selection when you have a mail to send out.



From here you can double click to open the list to make any changes needed.



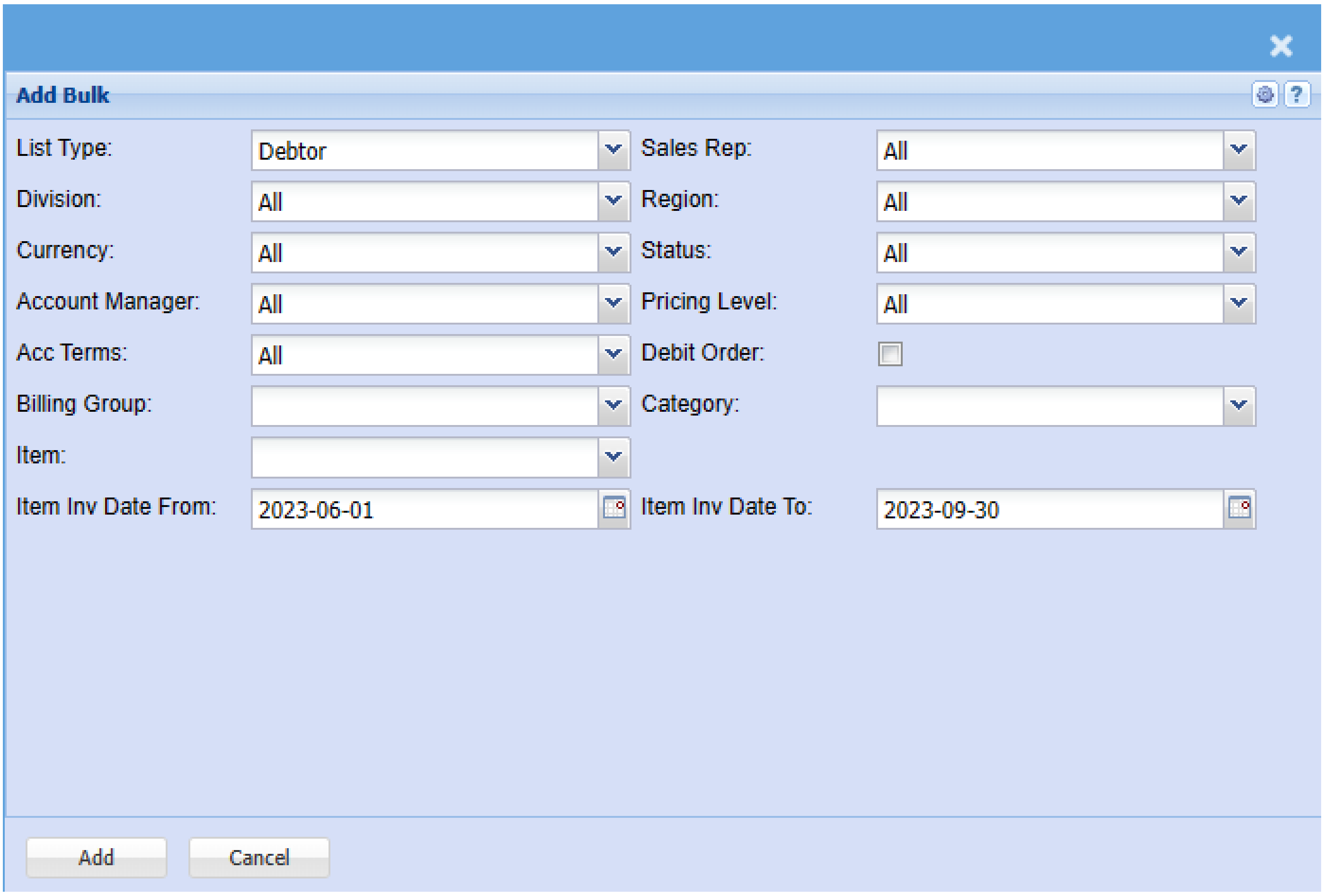
Save	Click Save to save any changes made
Add	Click Add to add a contact that may have been missed
Bulk Add	Click Bulk Add to add a bulk amount of Contact to the mailing list (Maybe from a different Contact Type or Category.)
Remove	Highlight the line you want to remove by clicking on the line and clicking Remove.
Remove All	Click Remove All if you want to delete all contacts in the mailing list

Export to Mail Chimp	Click Export to Mail chimp to create this mail list in Mail Chimp.

Bulk Add

You can add an Email mailing list in bulk or by group like all debtors or creditors.

- Click "**Bulk Add**" and the below screen will open
- By using the filters, you can create a quick mailing list



List Type	Select the list type you would like to add from (Debtors, Prospect, Opportunities)
Division	If you have set up divisions for your debtors, you can pull the report for all your debtors or you can select a specific Division from the drop-down menu.
Currency	If you are using multi-currency you can select it here
Account Manager	You can pull the report for all your debtors, or you can select a specific Account manager from the drop-down menu if you have set up Account Managers for your debtors.

Acc Terms	You can filter for specific Account Terms (30 Days, 60 Days, 90 Days etc.)
Billing Group	If you have billing groups like, Subscriptions, you can pull a report for these specific groups, or you can pull a report that will include all transactions.
Item	You can filter for Debtors/Customers who have purchased a specific inventory item
Item Inv Date From / Item Inv Date to	You can select the date range you want to filter for of a specific inventory item that has been purchased
Sales Rep	If you want to run a report by a specific sales rep, then you will need to select the sales rep on the drop-down menu. If you leave the sales rep on all the report will run by all sales rep.
Region	You can pull the report for all your debtors, or you can select a specific Region from the drop-down menu if you have set up Regions for your debtors.
Status	If you select all the report will pull all statuses. If you want to view report by status, select the status on the drop-down menu
Pricing Level	You can filter for specific Pricing Levels (In Season, Out of Season, Specials)
Debit Order	Tick the box if you would like to filter for Debit orders
Category	To generate the report, the user has to select the category from the drop-down menu

Revision #11
Created 5 March 2024 20:05:35 by Otsile
Updated 8 April 2026 23:18:01 by Pamela