

How to Create Mail and Email Lists

Description

Use this function on the RHS Actions tab to create mailing lists and email lists. Print the lists, record the task on Prospect records, create a follow-up, or add the list to a marketing event.

Step by Step

- 1 Navigate to the RHS Actions tab
- 2 Click **New**
- 3 Enter an **RHS Action**. This is a subject line for the list being created.
- 4 Specify **From Initial Contact Date** and **To Initial Contact Date** if you would like to filter out only Prospects and Inquirers with contact dates within a given time frame
- 5 Check the box to **Include Inquirers** on the list
- 6 Check the box to **Include Prospects** on the list
- 7 Verify **Community**. If incorrect, specify the correct **Community**.
- 8 Add **Filters** to select specific Prospects. Available fields are fields that appear on the Prospect page.
 - a. Select a **Field**
 - b. Select an **Operator**
 - c. Select a **Value**. You may select multiple values by holding down the Ctrl key and clicking on multiple items.
 - d. To add additional filters, click the **Add Filter** button
- 9 Click **Save RHS Action**

RHS Actions

1 RHS Action:

From Initial Contact Date: [10/23/2015]

To Initial Contact Date: [10/23/2015]

Include Inquirers:

Include Prospects:

EZLabel Owner:

Community:

Advertising:

Marketing Event:

Filters **2**

Add Filter

Field: <input type="text" value="Prospect Status"/>	Operator: <input type="text" value="equals"/>	Value: <input type="text" value="Waiting to Sell Home 6 - 12 Months"/>	Delete
Field: <input type="text" value="Status"/>	Operator: <input type="text" value="equals"/>	Value: <input type="text" value="Preliminary Search Not Ready Yet"/>	Delete
Field: <input type="text" value="WL Floor Plan"/>	Operator: <input type="text" value="not equal to"/>	Value: <input type="text" value="Studio"/>	Delete

3

Save RHS Action
Reset
Cancel

10 At the top of the page, click **Generate Email List** or **Generate Address List**

11 Click the **EMx** number of the report that is generated

RHS Action

Edit
Generate Email List
Generate Address List
Cancel

RHS Action: Autumn Concert	EZLabel Owner: Neomi Tsekhman
From Initial Contact Date	Community: RHS Sample Community
To Initial Contact Date	Advertising:
Include Inquirers: <input checked="" type="checkbox"/>	Marketing Event:
Include Prospects: <input checked="" type="checkbox"/>	

RHS Reports

Action	Report	Community	Created Date	Number of Lines	Owner
Delete	EMx-0015187	RHS Sample Community	10/26/2015 11:38 AM	119	Neomi Tsekhman

12 You may pare down your list by searching for key terms (e.g., name, city) and deleting unwanted entries

▼ Line List

Delete Selected Checkboxes 3

Search: 1

	EMxLines Name	First Name	Last Name	Address 1	Zip City State	Email	Description
<input checked="" type="checkbox"/>	1038428	Mr. Frank Butt & Mrs. Irene Cosway	Butt	935 Ranchview Cr. NW	Calgary, AB T3G1A4		Initial Call
<input checked="" type="checkbox"/>	1038429	Mr. & Mrs. John and Maria Laratta & Mrs. Irene Cosway	Laratta	85 Edenstone Way NW	Calgary, AB T3A4T5		Initial Call
<input checked="" type="checkbox"/>	1038430	Mr. & Mrs. Dave & Joyce Curwen & Mrs. Irene Cosway	Curwen	c/o 148 Gleneagles View	Calgary, AB T4C1W1		Initial Call
<input checked="" type="checkbox"/>	1038433	Jack & Dorothy	Klatt	1124 Northmount Drive N W	Calgary, AB T2L 0C4		Initial Call
<input checked="" type="checkbox"/>	1038437	Leslie	Lee	62 Christie Estate Terr. SW	Calgary, AB T3H 2Z5		Initial Call
<input checked="" type="checkbox"/>	1038438	Pauline & Bill	Smith	779-81 St. SW	Calgary, AB T3H 4C6		Initial Call
<input checked="" type="checkbox"/>	1038439	Mr. & Mrs. Pauline & Bill Smith & Mrs. Irene Cosway	Smith	779-81 St. SW	Calgary, AB T3H4C6		Initial Call

- 13** Click **Record Task** to add a task to each Prospect record to show this mailing. The task is assigned to the user creating the list and can be recorded as a complete activity.
- 14** Click **Create Follow Up** to create a follow-up activity on each Prospect record. The task is assigned to the owner of the Prospect record.
- 15** To print mailing labels and envelopes, click **Launch** and select *Labels* or *Envelopes*. Contact the RHS Success Team to upload a label and/or envelope template to be able to use this function.

RHS Report Edit Layout

EMx-0015187

[← Back to List: Conga Templates](#)

RHS Report Detail

EMxReport	Autumn Concert	EMHeader Name	EMx-0015187
Community	RHS Sample Community	Launch	<input type="button" value="Launch"/>
Number of Lines	119	Conga Template	<input type="radio"/> CMT-00030
Owner	Neomi Tsekhman [Change]	Conga Template Name	MergeFieldTest
Created By	Neomi Tsekhman, 10/26/2015 11:38 AM		

You're ready to download and print! [Show Details...](#)

Click each button to download letters, labels and/or envelopes. After you've downloaded a file, open it in Microsoft Word (or Adobe Acrobat) and print it.

Merge and Download:

File Type:

Microsoft Word
 Adobe Acrobat PDF

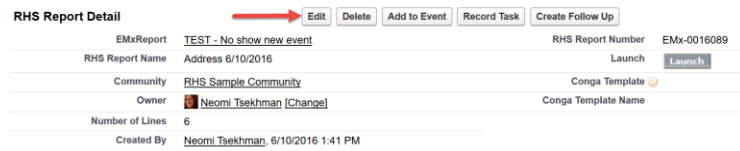
Multiple files?
Documents only. [What's this?](#)

One file (if possible, 40 Mb max.)
 Multiple files (zipped)

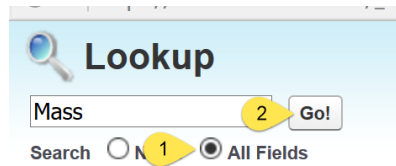
Create a Mass Mail Merge

Contact the RHS Success Team with a letter template, indicating which fields you would like to merge. The team will prepare the document and upload it for use with the mass mail merge function.

- 1 At the top of your report detail page, click **Edit**



- 2 Enter the word *Mass* in the **Conga Template** field and click on the magnifying glass.
- 3 Click the **All Fields** checkbox and click **Go**



- 4 You will see a list of all of your organization's mass mail templates.
- 5 Select the template you would like to use
- 6 Click **Save**
- 7 Click **Launch** and select *Letters/Documents*

