HOW TO CREATE A BULK EMAIL FROM THE BIS PLATFORM:

- Login to The BIS Platform
- Go to the **Sales** menu
- Click **E-Mail Merge (Emails)**
- On the right of the screen click "**Create New Email**"
- On this page you can give your email a name (for your records), choose the email address that the email is sent from, enter the **subject of your email** and most importantly, compose your email.
- Note that you can address the client by their first name by using the placeholder [firstname] e.g. Dear [firstname].
- You also have the option to include attachments (click **Attachments** in the Tasks/Actions panel)
- If you wish to include images in your email, your image must have a URL. If your image does not have a URL you can use free hosting websites such as https://postimage.org/. When you have a URL you can embed it into the body of your email by clicking on the image icon:

  
- When you have composed your email, click **Select Recipients**
- Here you have 3 option to choose from "**All Customers**", choose from "a **category"** that you have created previously (or multiple categories) or alternatively, if you scroll to the bottom of the page, you will see an option to individually select people from your **list of clients.**
- When you have selected your intended recipients, click **Continue** in the Tasks/Actions panel
- On the following page you can review your email and review the list of recipients.
- If you wish you can send a sample email to yourself by clicking "**Email sample to XXXXX**"
- When you are ready to send the email click **"Send All Emails"**

HOW TO CREATE CUSTOMER CATEGORIES.

1. **Add customers manually** – Go to Sales > Customer Categories > Click Add New Category > Give the Category a name > Click Add / Remove Customers > Select Customers > Click Save

2. **Using the Reports area** – Go to Reports > Choose your Report type e.g. Prospect Client List or Multi Variate Report etc > For Report Format choose **"Browser"** > Click Create Report – this will open a new browser window.
   At the top of the screen locate the following: *You can create a category (for marketing) using the clients in this report, or you can add them to an existing category. To do this click here*
   Click on "click here" > Give the category a name > Click "**Create Category**".
   Alternatively, on the same screen, you can add the clients to an **existing category**. To do this rather than the above step, choose the existing category from the dropdown list > Click "Add to Category"

To view a short video instruction to help with the above, click here