



We want to introduce "E-MAIL SCHEDULER" with various options & utilities.

HOW TO SEND E-MAILS USING THIS SOFTWARE?

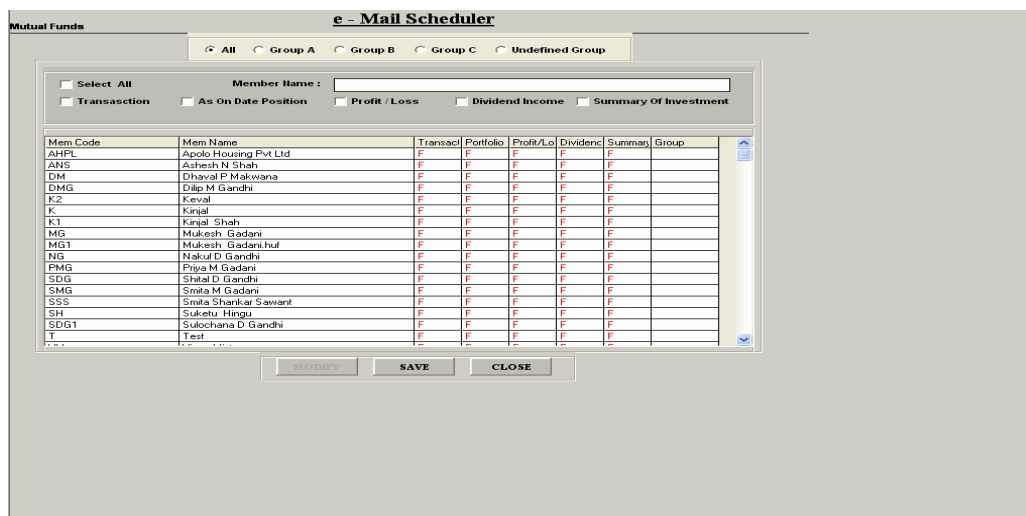
Before going to use E-Mail Scheduler make sure that "Outlook Express" is configured on your machine and "Send and Receive" is working properly. Select E-Mail Scheduler from Utility Menu.

- ❖ Differentiate all your Clients in four different groups i.e. Group A, Group B, Group C, Clients which are not defined in any age group will be placed in Undefined Group.
- ❖ Suppose you want to send Daily E-Mails to targeted clients then place those in same group say Group A, Weekly reports say in Group B and for Monthly report say in Group C. Grouping is provided for bifurcate clientele with different criteria (i.e. HNI clients/ Retail Investors/PMS Clients).
- ❖ Press "Modify" Button, Select a Client and you can send him 5 different reports such as **Transaction Report, Portfolio As On Date report, Profit / Loss Report, Dividend Income Statement & Summary of Investment Report** by changing the Status of that report from "F – T" by just clicking on it.
Where,
F = Don't send the report
T = Send the report

Select Group by clicking on it Press "**Save**" button after finalizing the status for clients.
- ❖ To send an E-Mail, select the **E-Mail Sender** from Utility Menu.
- ❖ Select **From Date & To Date** and **Appropriate Group**, i.e. Group A, Group B, and Group C and Press "**Start**" Button. E-Mail will be send to those clients who resides in selected group.
- ❖ **Only those reports will be send to clients as E-Mail for whom Status is "T" against that report in E-Mail Scheduler.**
- ❖ **E-Mail address should be defined in Client Master for sending E-Mails to the clients.**

Path: Utility → E-Mail Scheduler (MEMBER)

The module allows User to send reports to investors on an automatic basis. The E-Mail Scheduler for Member is configured with MS Outlook Express and as such only Users with MS Outlook can use this feature. User can select the reports he/she needs to send and create Investors sets as well.



The following are the steps to use the E-Mail scheduler in an effective way.

- Step 1:** When you click on E-Mail Scheduler, it will show a message **Do You Want To View The Clients / E-Mail Details?**
- Step 2:** Click on **Ok** button, then the above Window (Having 8 columns) will open.
- Step 3:** Click on **Modify** button to allow changes in the window.
- Step 4:** The user can select single Member by typing the name in the blank field on the top of the screen. If he/she does not wish to select a single Member the default option is **ALL**. Changes will affect Single or All Member records depending on selection.
- Step 5:** Select the **Select All** option to send all 5-reports listed above or select on individual reports.
- Step 6:** Click on the cell under the Group column to assign a group to that client.
- Step 7:** Click on **Save** button to save the changes.
- Step 8:** Click on **Close** button to go back to main menu.

PLEASE NOTE THAT A SIMILAR E-MAIL SCHEDULER WINDOW IS AVAILABLE UNDER UTILITY FOR CREATING FAMILY GROUP AS WELL

Mutual Funds

Sending e-Mail To Clients

Date From: To:
 Last Updated File Is : 2326 - WT Data 02-Jul-2009(Additional)

Group A
 Group B
 Group C

Family
 Member

For Profit / Loss and Summary of Investment

Omit Folio With Zero Balance
 Omit Transaction with Zero Balance

Subject:

Content:

Caution :-

- > Sending Of e-Mail May Take Few Minutes Depending Upon The Criteria Selected.
- > It Is Advisable To Close All Other Application Before Starting The Process.
- > Supports Only Windows - 2000 or Higher Operating System.

Through the E-Mail Sender the User can E-Mail reports to investors (Members or Family Level). **IT IS NECESSARY THAT E-MAIL ADDRESS IS DEFINED IN CLIENT MASTER FOR SENDING E-MAIL TO THE INVESTOR.**

- Step 1:** User must enter **Date From** and **To** only when e-mailing the Transaction List Report. All other reports will be generated and sent as on the latest date.
- Step 2:** Select the appropriate group i.e. Group A, B Or C.
- Step 3:** Select the **Family** or **Member** options as per the requirement.
- Step 4:** User can also select **Omit Folio With Zero Balance** and/or **Omit Transaction With Zero Balance** in order to send reports which will have details of active investments only.
- Step 5:** Fill up the **Subject** field which will reflect as the subject in the E-Mail.
- Step 6:** Fill up the **Content Field**, which will reflect as the content in the E-Mail.

E-Mails will be sent to all investors in the selected Group. Only those reports will be sent to investors through E-Mail for which the status is defined as T (F – Don't send the report, T- Send the report)

Hope above information will become helpful to you to sent reports to your clients through E-Mail. For any further queries kindly contact us. We are always ready to serve our valuable clients.