

IN THIS ISSUE

- ✘ Sending a Quick Email to a Primary Contact

Sending a Quick Email to a Primary Contact

To send a quick email to a primary contact on the client card file, make sure the email address is added to the contacts record. Perform the following steps to send a quick email to a primary contact:

1. Locate the client through **SEARCH** and click the **Details** icon to display the client's card file tab.

The screenshot shows the Nexsure search interface. The search results table has one entry for 'Mason Crenshaw'. A red box highlights the 'Details' icon (a document with a magnifying glass) in the first column of the table. A red arrow points from this icon to the next screenshot.

Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
Mason Crenshaw	Personal	Client	620 Balssa Ave	Brea	CA	92821-3610	[Icon]

2. On the **card file** tab, click the client's **E-Mail** link.

The screenshot shows the client card file for 'Mason Crenshaw'. The 'Mason Crenshaw Information' section contains the following details:

- Primary Contact:** Name: Mr. Mason Crenshaw, Goes By: Mason, Title: Owner, E-Mail: maryo@xdtl.com, Home Phone: (714) 990-1256
- Mailing Address:** Location Type: Primary Residence, Address: PO Box: 6700, City: Brea, State/Province: CA, Zip/Postal: 92821-3610, Country: International Info: Phone: (714) 990-1256
- Tracker:** Date Created: 10/10/2008, Client Since: 10/10/2008, Related Accounts: 1
- Alerts:** Open Actions: 5

A red box highlights the 'E-Mail' link in the primary contact information. A red arrow points from this link to the next screenshot.

- On the **delivery > email** tab, enter all necessary information for the email. All boxes with a red * asterisk are required fields. Once completed, click the **[Send]** link.

E-Mail Information

Title: Quick email message *

From: Mary Oberleitner *

From Email Address: maryo@11zzw.com *

To: Mr. Mason Crenshaw *

To Email Address: maryo@xdti.com *

CC: *

BCC: *

Regarding: Quick email message *

Message: Quick email message to primary contact. *

Mary Oberleitner
Phone: 714-814-0000

* Required Field

[Send] [Cancel] [Close]

- Click **OK** on the email sent confirmation dialog box.



The sent email is stored on the client's **delivery** tab.

Client Name: Mason Crenshaw

Showing Page 1 of 1

From Name From Email	To Name Sent To	Client Name Created By	Title Regarding	Status Message	Date Created Date Delivered	Via
Mary Oberleitner maryo@11zzw.com	Mr. Mason Crenshaw maryo@xdti.com	Mason Crenshaw Mary Oberleitner	Quick email message Quick email message	Successful Email sent	12/16/2009 14:47:53 PST 12/16/2009 14:47:53 PST	Email