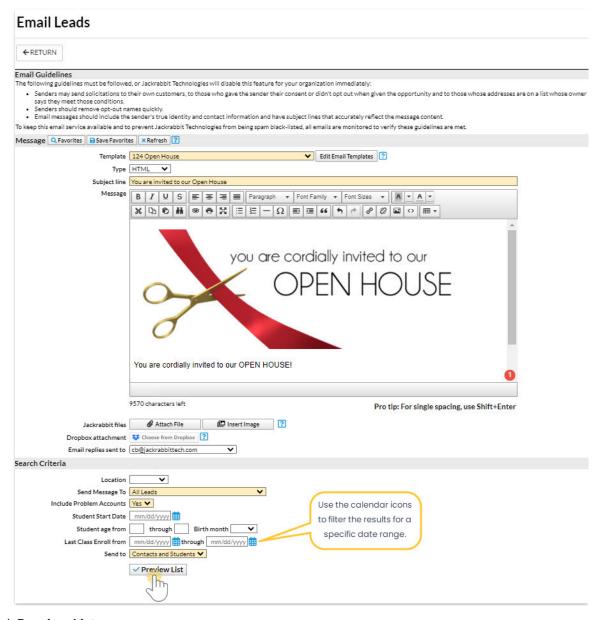
## **Email a Group of Leads**

Last Modified on 10/19/2023 8:11 am EDT

When you would like to email families that have been moved to the Lead File, follow these steps:

- 1. Go to the Families (menu) > Lead File.
- 2. Select **Email Leads** from the menu on the left.
  - In the Email Message section select a Template OR enter an Email Subject Line and Message.
- 3. Click **Attach File**, **Insert Image**, or **Choose from Dropbox** to attach files and add images if needed. See **Email Attachments and Images** for more details.
- 4. Select a reply email address for the email.
- 5. Use the **Search Criteria** to select the recipients.
  - o Click the calendar icons to filter the results for a specific date range.



7. Click Preview List.

- 8. Confirm the Matched Recipients. To omit an email address clear the checkbox.
- 9. Click **Send Now** or select **Send Later** if you wish to schedule this email to be sent at a later date (**Schedule an Email Send Later**).



When you are entering the text for your email message, use Shift+Enter to create single spacing between lines and the Enter key for double spacing.