

# 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.
  - o 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.

The screenshot displays the 'Email Leads' interface. At the top, there is a 'RETURN' button. Below it, the 'Email Guidelines' section provides instructions on sending solicitations. The main area is the 'Message' editor, which includes a template dropdown (set to '124 Open House'), a subject line field (containing 'You are invited to our Open House'), and a rich text editor with a toolbar. The editor content shows a red ribbon graphic with scissors and the text 'you are cordially invited to our OPEN HOUSE'. Below the editor, there are buttons for 'Attach File', 'Insert Image', and 'Choose from Dropbox', along with a dropdown for 'Email replies sent to'. The 'Search Criteria' section at the bottom contains various filters: 'Location', 'Send Message To' (set to 'All Leads'), 'Include Problem Accounts' (set to 'Yes'), 'Student Start Date' (with a calendar icon), 'Student age from' and 'Birth month' (with a dropdown), 'Last Class Enroll from' (with calendar icons), and 'Send to' (set to 'Contacts and Students'). A 'Preview List' button is highlighted with a hand cursor. A yellow callout box points to the calendar icons with the text: 'Use 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.

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