

## **Wish List Emails**

Wishes taken at point of sale include the option to send a notification to a potential customer. However, using the **Email Wishes** feature in the **Customer** area, you can create a mailing for a number of wish lists.



- This process could take some time to run. You might want to wait until off hours to run it.
- The recipient of the list is the person indicated in the original wish creation. Make sure you check the recipient before sending these emails.

To send wish list emails:

1. Select Customer ► Wish Lists ► Email Wishes. The Wish List Email Filter will appear.

Wish List Email F	ilter
Individual Customer	•
Full Customer Filter	•
Wish Associate Added	•
Presets	OK Cancel

You can develop a mailing list for wish list emails in one of three ways:

- By individual customer
- By a group of customers
- By the associate or associates who took the wish.
- 2. Use the appropriate find filter to create the desired list. A matching list of wishes will appear.
  - a. Individual customer. The **Wish Lists to be mailed** window will appear with a list of that customer's wishes.

Wish Lists to be	e emailed: (1)							
Wishes	Item Filter		•		All Customers	No Customers	All Wishes	No Wishes
Email Settings	Maple, Jus	stin (001-12042)				~		
	V		0.62 Carat Loose Princess Cut Dia					
	V		0.77 Carat Loose Princess Cut Dia	amond of H/SI1				
		Ð	14kwg Solitaire Ring Mounting wit	h 1/2 Ct Head				
							Email & Close	Cancel

Use the down arrow next to the customer's name to see his or her wishes. By default, the customer's wishes will be checked. Use the checkboxes, **All Wishes** or **No Wishes** to determine what wishes should be emailed.

b. Several customers. The **Wish Lists** to be emailed window will appear with matching customers and their wishes.

Wish Lists to be	emailed: (508)					
Wishes	Item Filter	All No Customers All Wishes No Wishes				
Email Settings	Camillus, Howard (001-00391)	×				
	54" - 8-9mm Multi-Colored Baroque Freshwater Pearl Necklace					
	54" - 8-9mm Baroque Multi-Colored Tahitian Pearl Necklace in Gold Tones					
	54" - 8-9mm Baroque Multi-Colored Freshwater Pearl Necklace in Black/White Tones					
	✓ Goshen, Eileen (001-00394)     HOME -	eileengoshen@aol.com <				
	O Dayton, Jim (001-00414)	v				
	✓     ✓     Walden, Brad (001-00419)	v				
	▼ Farmland, Leao (001-00465)     HOME -	lfarmland3656@gloucester 👻				
	Prinale Monte (001-01142) W/ORK -	monte princle@aol.com V				
		Email & Cancel				

Using the down arrows next to each customer's name, you can see his or her specific wishes. By default, all customers and all wishes will be checked. Use the checkboxes, **All Customers**, **No Customers**, **All Wishes**, and **No Wishes** to specify which emails to send.



You can use the Wishes tab of the find filter to build the list.

- c. By associate. Use the Associate drop-down from the Wish List Email Filter to select the associates whose customers' wishes you want to send. The Wish Lists to be emailed window will open. It works just like the results using several customers. Make your selections.
- 3. Select the **Email Settings** tab to set up the email template.

Wish Lists to b	e emailed: (1)				
Wishes	Subject	Wish List for {CustomerName}			
Email Settings	Salutaion	Greetings {CustomerName},	✓ Include		
	Opening Paragraph				
	CC Email Address				5
				Email & Close Cance	el

The Edge will complete the name and email address for selected recipients when the emails are sent. Note that email headers, footers, and greetings are set in Administrative  $\triangleright$  Notifications, so opening text is optional. For more information, see the section entitled Notifications.

- 4. Select Include to include the salutation shown.
- 5. If desired, enter additional or custom text for an opening paragraph.
- 6. Enter an additional email address if desired. Use a semicolon to separate multiple entries.
- 7. When all selections and settings are complete, select Email & Close. The emails will be sent.

A sample wish list email might appear as follows.

Greetings Smith, Bob,

We wanted to remind you that the gift idea you had for your wife is still here.

Lady's Pendant With 6=0.06Tw Round Diamonds