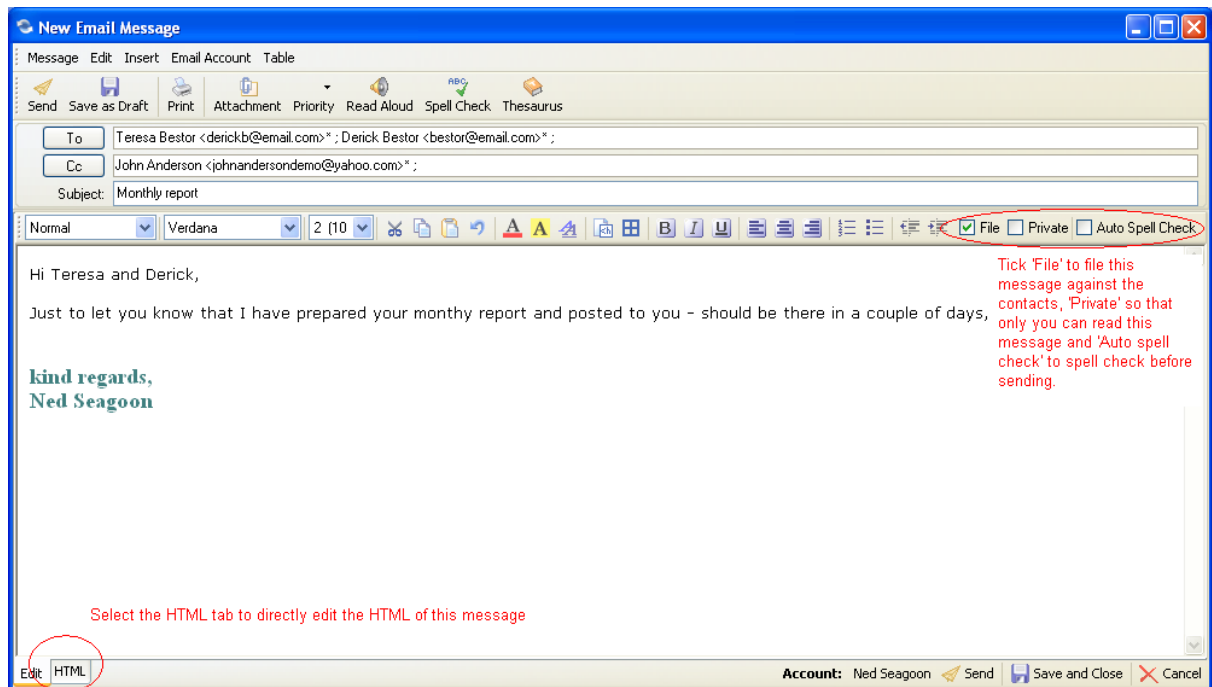


## Sending an email

### To create a new email:

Click the Email button (white envelope) at the top of the screen, or right click on the required contact name in the treeview and select 'New Email'.



### Selecting recipients

If the email was initiated by right clicking on a contact, the selected contact's name and email address are shown in to 'To' field. Further recipients may be added, separated by a semi colon. A quick method of adding email addresses is to enter the first characters of the recipient's name and press Enter. This displays a list of contacts to select from. Double click on the required contact name to add them to the list of recipients.

### Formatting text

The Fort CRM email editor contains standard options for formatting text, such as

- Cut, Copy, Paste, Left align, Right align.
- Search for specific words within the content using the Find option from the Edit menu.
- Insert Tables, URL's or Pictures into your email.
- Spell check, and auto spell check.
- 'Read Aloud' to ensure your email sounds the way you intended it.
- Adjustment of font size, colour, style, etc.

### **Saving an email**

You can save an email at any time by clicking on the 'Save and Close' option at the bottom right of the screen. The email will be saved into the 'Drafts' folder where it can be accessed at any time to be edited or sent.

### **Attaching a file to an email**

You can attach one or more files to your email by clicking on the 'Attachment' button at the top of the screen and browsing to the location of the file you want to attach. Once the file is selected, click the 'Open' button to attach the file to the email.

### **HTML**

Forté CRM email messages are sent in the standard HTML format. The HTML can be edited directly by clicking the HTML tab at the bottom of the editor window.

### **Sending an email**

After entering the recipient's address, message subject, and the content of the message, you can send the email by clicking on the 'Send' button, either in the top left corner of the screen, or at the bottom right the screen. The email will be stored in the Outbox to be sent on the next 'Send and Receive' cycle. Emails in the Outbox can be moved to the Drafts folder if you change your mind prior to sending.

Emails are automatically updated (sent and received) every 5 minutes or you can manually send and receive emails by clicking on the 'Send and Receive' button at the top of the screen.