



# How to Send a single email to more than one customer contact using SageCRM's email editor

## SageCRM Tips & Tricks

### Summary:

The purpose of this whitepaper is to provide instruction on how to send a single email to more than one customer contact using SageCRM's email editor.

### Assumptions:

During this discussion I will be presenting how to send a single email to more than one customer contact using SageCRM's email editor.

### Prerequisites:

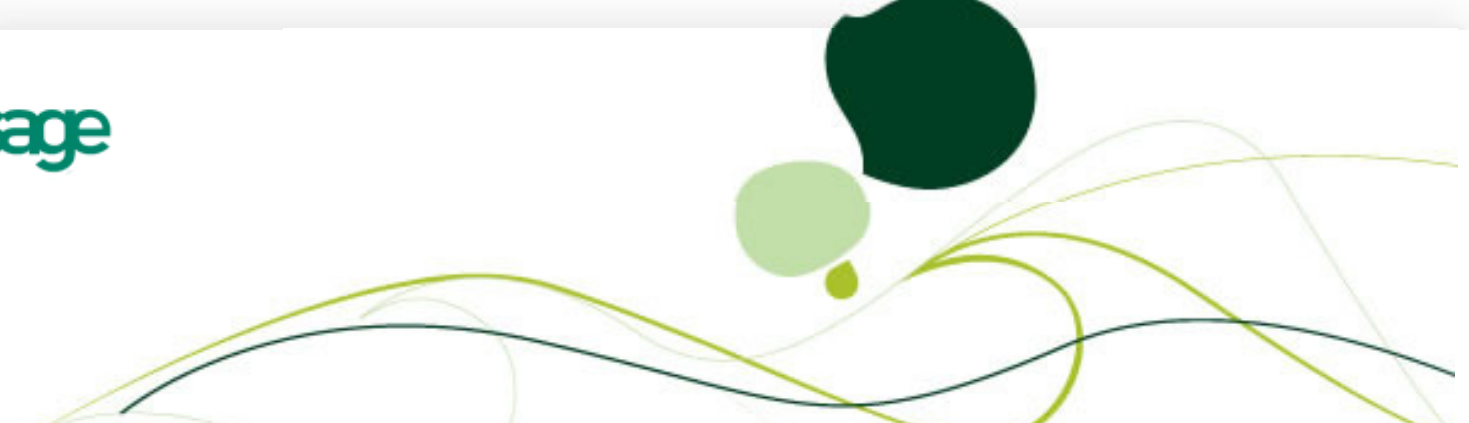
SageCRM 5.0 and newer. In order to use this feature one setting for each user must be confirmed. Each user's preference for "E-mail Screen Position:".

1. If you navigate to My CRM | Preferences | Click the Change button
2. Find the "E-mail Screen Position:" field. There will be three options:
  - Split
  - Normal
  - Popup
3. All of the above mentioned options will work for this example EXCEPT for "Normal". Normal replaces the screen you are on when you click on an email address and will not allow you to navigate away from the email without losing it's context.
4. "Split" and "Popup" will allow a user to navigate away from the email but keep the email still in context or available.

### Demonstration:

Over the years many members of the SageCRM Community have asked how can I send an email to more than one SageCRM person, company, lead, lead contact at a time. As mentioned earlier if you confirm the prerequisite above of using Split or Popup then this demonstration will work for you.

1. First navigate to a person record.
2. Click on the email address of the person in context.
3. At this point depending on your selection a different behavior will occur, either way this feature will work but you have to navigate differently. To be clear if you are using a split screen then the email will open up at the bottom third of the SageCRM you are on. If you are using Popup then you will see the email popup as a separate window away from SageCRM.
4. Let's recap; we have the email editor open with an email address of the person you navigated to in step 1.
5. Now go back to SageCRM and Right Click on the Find button.
6. Select the Person Entity on the right click pop-out menu.
7. Now search for ANOTHER person than the person used in step 1 above.
8. Now that you have another person in context lets add the new person to the existing email you already have open.
9. In order to do this simply click on the persons email address. This will add this new person's email address to the existing email you have open.



Ok, so everyone is now really excited about being able to send an email to any person in the SageCRM database BUT what if you wanted to CC or BCC that person or a different person.

1. Will at this point find the next person you want to CC.
2. Once that person is found then HOLD down the CTRL key and at the same time click on the persons email address.
3. Now this persons email address will now appear in the CC for the email you have open.
4. Now if you have followed all of the above steps you should have three email addresses in your single email.

Shortcut	Adds the email address to the following line in the email editor
Single Click any email address	To:
Hold down Shift button + Single Click any email address	To: (Yes it is redundant and would really never be used)
Hold down CTRL + Single Click any email address	CC:
Hold down Alt + Single Click any email address	BCC:

## The End