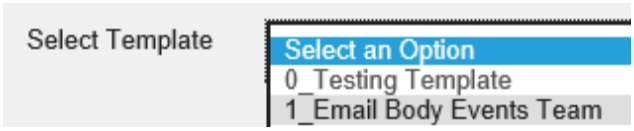
Emails and Sending Emails

How to send email?

HOW TO SEND AN EMAIL:

1. To send an email you need to click on the 

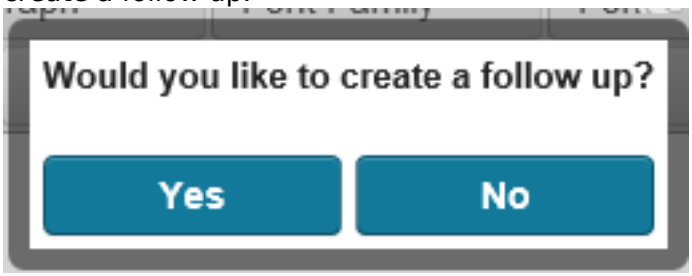
Â button in the Clear Activity Page or in the Customer Details Page
2. The **Write Email** page will open.Â Select the template you wish to use.Â For a generic email, select
Â email template 1)Email Body Events Team Â 

There are numerous templates you can choose and edit to send to the customer.Â

3. Check Recipient email is correct.
4. If you want to CC another customer or staff member, you can manually type the email address orÂ copy and paste their email address into the CC field.
    1. To copy and paste an email, click on **Customer** menu, right click on **Search**.Â Search for the customer you wish, select the name and copy and paste the email into the CC field.
5. There is no need to BCC a customer or staff member.Â If you do need to BCC an email, then manually type the email address or copy and paste it in the BCC field.
6. Type or edit the Subject Heading.
7. Check the email to make sure you have the correct template.Â Type any additional information for the email.
8. Scroll down and click on the 

Â button.
9. After clicking on the 

Â button, you will be asked if you would like to create a follow up.



    1. If you clickÂ 

Â Â This will open up a new page for you to create a follow up activity.Â The email will be sent and saved as a history on the customer's account.Â Then a new page will open for you to schedule a follow up.Â Refer to Follow Up
    2. If you click 

Â it will send the email to the email addresses entered and will save a history in the customers account.

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:05
URL: https://staff.iconic.productions/KB/content/0cat=42/144/en/how-to-send-email.html

3. Close the tab to finish action.

Attached files:

Unique solution ID: #1143
Author: n/a
Last update: 03-Feb-2016 01:43

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:05
URL: https://staff.iconic.productions/KB/content/0cat=42/144/en/how-to-send-email.html