Sending Mass Communication using email in VisionVPM

This document describes how to quickly and easily send out a mass communication email to your clients for special events or important information.

Although it is possible to also send Mass Communications via SMS from VisionVPM, cost considerations make email the preferred methodology. There are no costs associated with sending emails, even in large numbers.

Another benefit is the amount of information that can be relayed via Email opposed to SMS, including hyperlinks and images.

Considerations

Consider the Clients you wish to target. Options include but are not limited to:

- All Active clients with an email address
- All Active clients with an email address with at least one alive and active animal
- All Active clients with an email address with at least one alive and active animal that has a last visit date since 1 JAN 17

Using the Marketing Schedule in VisionVPM, each of these searches are possible and can be narrowed down further if required.

For the purposes of this document, we will be using **All Active clients with an email address with at least one alive and active animal that has a last visit date since 1 JAN 17.**

Perform the Search

1. Go to Clients Menu > Marketing Schedule > Insert
2. From the **Client** tab, enter **Y** in the **Has Email** field
   Note: by default, the search will be looking at Active clients, this is, Not Inactive

3. From the Animal tab

   - Enter **N** in the **Inactive** field to search for Active Animals.
   - Enter a last visit between range between 1 JAN 17 and a future date i.e. 31 DEC 20

   Note: by default, the search will be looking at Alive animals

4. From the **Options** tab, select **One record per client** under the Duplicate record options

5. **Run** the search. You will be prompted whether to save the search which is optional.

6. Review the search results. Use the **Clear Lines** button to remove any clients you do not wish to contact.
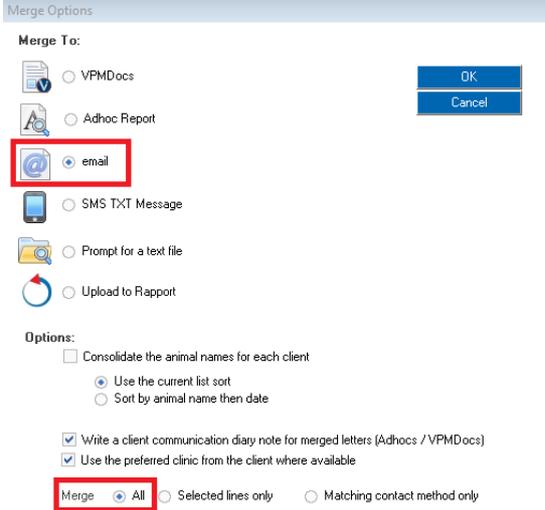
covetrus
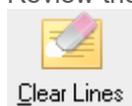
Send an Email

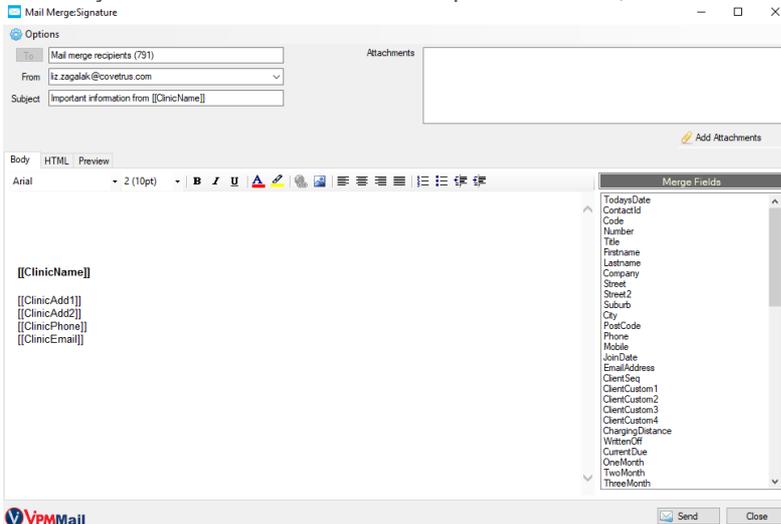1. Select the **Merge** button
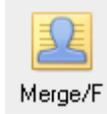
2. Select **email**. Leave all other defaults and select **Ok.**

3. The list will then be prepared and the VPMMail window will open with the number of Mail Merge Recipients matching the number of results.
Note: if you have a Default Clinic Template selected, this will load automatically

4. Compile the message you wish to send.

- Merge fields are available on the right-hand side to customise the email to the client
- Standard formatting options are available across the top of the Body tab
- Use **add attachments** to send any additional information

5. Select the **Send** button.

NOTE: Most email providers have a limit to the number of emails that can be sent per day or per hour. This can be specified in Maintenance > System Defaults > Email Setup

When sending multiple emails, send 20 emails then wait 5 seconds

Please check with your provider before sending mass communications to ensure all the emails will be sent out correctly.

VisionVPM or Covetrus are not responsible for any text or image content in the emails you create and deploy.

Contacting the VisionVPM Service Desk

If you require help throughout the steps described in this document, please contact the VisionVPM Service Desk.

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