

Customer Bulk Mailings Using Aspire

Question: How can I send bulk email to my customers out of Aspire?

Answer: There are three ways to send bulk emails depending on the requirements of your mailing.

1. [Bulk Mail from the Aspire Contact List](#) – Perform bulk mailing directly from Aspire’s *Contacts Search List* screen.
2. [Bulk Mail from the Aspire Work Ticket List](#) – Perform bulk mailing directly from Aspire’s *Work Ticket Search List* screen.
3. [Extract Mailing List to MailChimp](#) – Extract a list of contacts from Aspire based on criteria you establish, and import them into MailChimp. Then send mailing out from MailChimp.

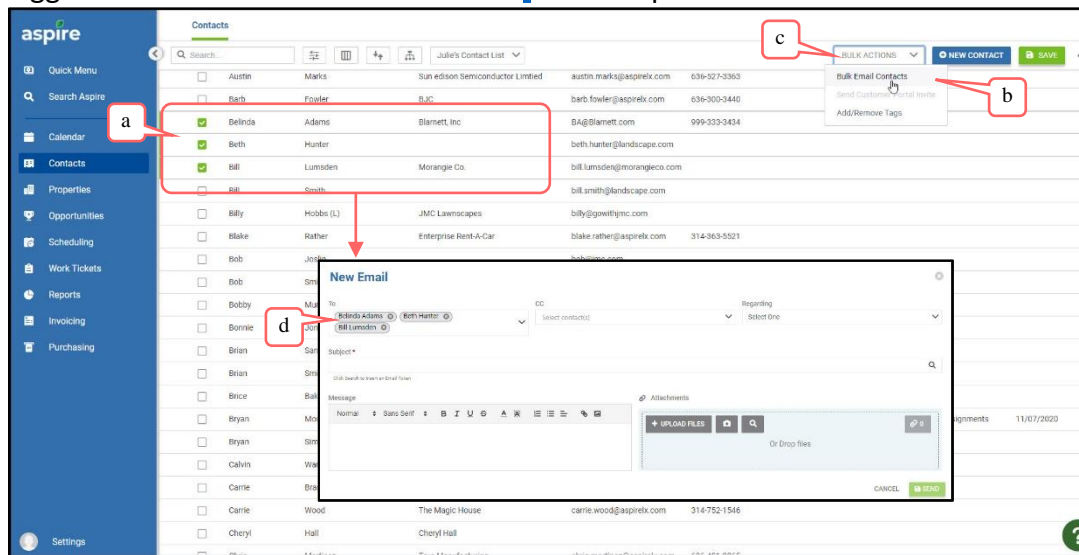
The Work Ticket approach is more limited but may work for you in some special cases. It is the simpler approach since it does not require a third-party tool.

Using MailChimp reduces the chance that your emails will be black-listed by the recipient’s server. It also provides greater flexibility in creating your mailing lists.

This article explains these approaches.

Bulk Mail from the Aspire Contacts Search List

Mass Emailing of Contacts – The *Contacts Search List* screen allows users to select displayed contacts^a, and then initiate an email addressed to those contacts^d by selecting the *Bulk Email Contacts* option^b from the *Bulk Actions* icon^c. The *Bulk Actions* menu is only displayed if the logged in user's role has the Mass Email_Contacts permission.



When emails are sent in this manner, individual emails are sent to each recipient so that

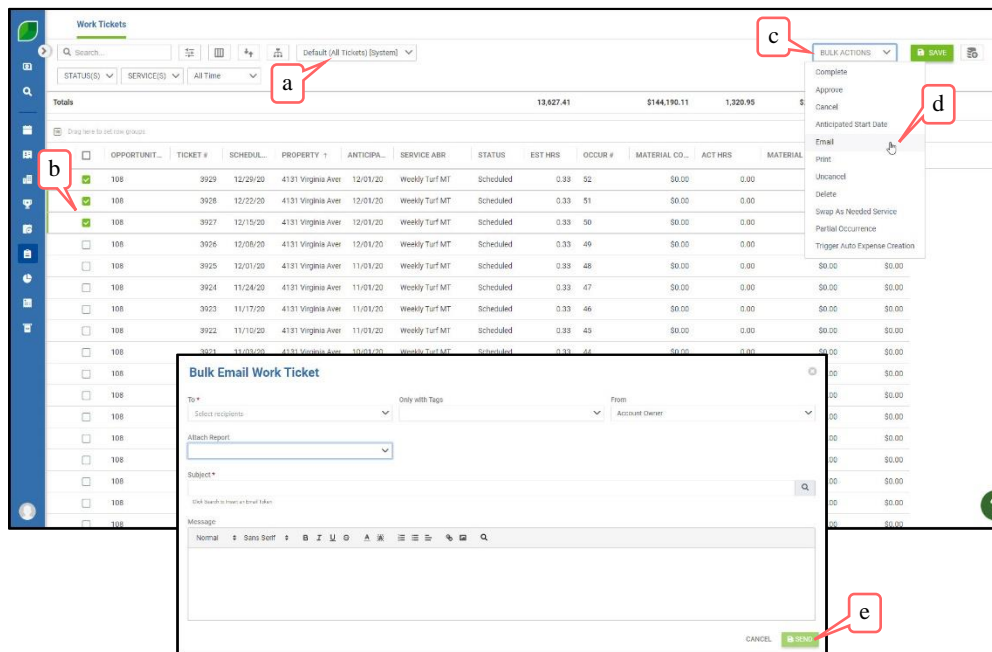
Bulk Mail from the Aspire Work Ticket List

You can email clients directly out of Aspire from the Work Tickets screen (work tickets search list). The screen is designed to send out individual work ticket-specific messages to all specified recipients for each selected work ticket. You can choose to send to the primary contact, the billing contact, or to all property contacts.



Note that if multiple work tickets are selected for the same property, the recipients will receive multiple emails – one for each selected work ticket. The tool allows you to place tokens in the subject of the email that are filled in with valid values for each work ticket when the emails are generated. Additionally, you may attach a printable work ticket to the email.

This list allows you to place a checkmark next to the tickets for which Aspire will locate the property contact associated with the ticket and send them an email by using the following steps:

1. Specify criteria^a in the Work Ticket list to select the work tickets for which you want to send out notifications. See article, [Creating Search Lists in Aspire](#), for additional information about creating search lists.
2. From the list, place a checkmark^b next to the work tickets for which you wish to send emails. To check the boxes for all the listed items, click the box with a checkmark in the header. To uncheck the boxes for all listed items, click the box with no checkmark in the header.
3. Hover over the *Bulk Actions Dropdown*^c to display available options and select the *Email* option^d. For the *Email* option to be available on the Work Tickets screen, the user must be assigned to a role that has the *Ticket Bulk Email* privilege. If the option is not available, see your system administrator.
4. Fill in the fields as explained in the table below, and click the *Email* icon^e.




Name / Label	Description
Send To	<p>Required. Provides three options for you to specify the recipient:</p> <ul style="list-style-type: none"> • Primary Contact = Sends to the primary contact on the property for each work ticket • Billing Contact = Sends to the billing contact on the property for each work ticket • Property Contact = Sends to all contacts on the property for each work ticket <p>You can specify more than one of these. For example, if you choose Primary Contact and Billing Contact, Aspire will send to both. By definition, Property Contact includes the billing contact and primary contact.</p>
Only with Tags	Optional. Allows you to specify contact tags. If provided, email will only be sent to contacts with the specified tags.
From	Required. Choose radio button to specify account owner

Name / Label	Description
Subject	Required. Allows you to specify the subject of the emails that will be generated for each selected work ticket. The <i>Insert Email Tokens</i> icon  next to the <i>Subject</i> field allows you to insert tokens into the subject that populate with ticket-specific values when Aspire generates the emails.
Attach Report	Optional. When Aspire generates the email messages to be bulk sent to the desired recipients, it attaches a printable (pdf) <i>Work Ticket</i> report if this field has a value. The <i>Attach Report</i> field allows you to choose the report format for the report. Only formats that you have explicitly defined for this report will be available. This is the same report that displays if you choose the <i>Print</i> option from the gear icon on the Work Tickets screen (work ticket search list). If you do not select a report format, no attachment will be included.
Message Body (not labeled)	Required. The area directly underneath the Attach Report field supports the text body of the email message. When you click in this area, a dialog window will be displayed to allow you to enter text. The message supports message formatting (bold, underline, fonts, lists, etc.).
Send icon 	When you click the <i>Send</i> icon, Aspire will generate the emails specified by your selections and send them to the intended recipients.

Extract Mailing List to MailChimp

You can use Aspire to maintain search lists and create/send your bulk emails using MailChimp. Whenever necessary, you can update the distribution list in MailChimp by extracting the list of contacts from Aspire and importing into MailChimp.

1. Create your search list(s) in Aspire using appropriate criteria for your mailing list. These search lists should at minimum display the names and email addresses of the individuals to receive emails. MailChimp will allow you to import other identifying information (such as company name) that might be useful for managing your mailing lists. See article, [Creating Search Lists in Aspire](#), for additional information.
2. Export the search list from Aspire into an Excel spreadsheet. On any of the Search List screens in Aspire, you do this by clicking the Extract to Excel icon  in the lower right-hand corner and saving the spreadsheet to a known location.
3. Import the spreadsheet into MailChimp. The MailChimp article, [Import Subscribers to a List](#), explains how to import into MailChimp using an Excel spreadsheet using the copy and paste method.
4. Use MailChimp to set up and send mailing campaigns.
5. Manage your search lists in Aspire on an ongoing basis to ensure that you are ready to update MailChimp. Extract from Aspire and refresh MailChimp as necessary.

Hints

Here are some hints for managing the MailChimp approach to bulk emailings.

1. You can use any search list in Aspire that provides a valid list of names and emails. Good search lists to use for lists of contacts include Contact list, Property list or Opportunity list.
2. You can use contact tags or property tags in Aspire to identify contacts for a specific purpose and then filter on those tags when exporting to MailChimp. For example, you could create a tag called “Snow Notifications” and assign that tag to appropriate

properties. This will allow you to filter the *Properties* search list based on that tag each time you update the MailChimp list.

3. Your search lists should at minimum display the names and email addresses of the individuals to receive emails. MailChimp will allow you to import other identifying information (such as company name) that might be useful for managing your mailing lists
4. When you import lists from Aspire to MailChimp, MailChimp will automatically eliminate duplicates.
5. When you re-import lists from Aspire to MailChimp, MailChimp will only add new contacts.