How to setup Mass Emailing

<u>Pre-Requisite: The Emailer must be configured on the machine</u>

1. Create a report in the format you want to email, filtering on a specific value e.g. Customer
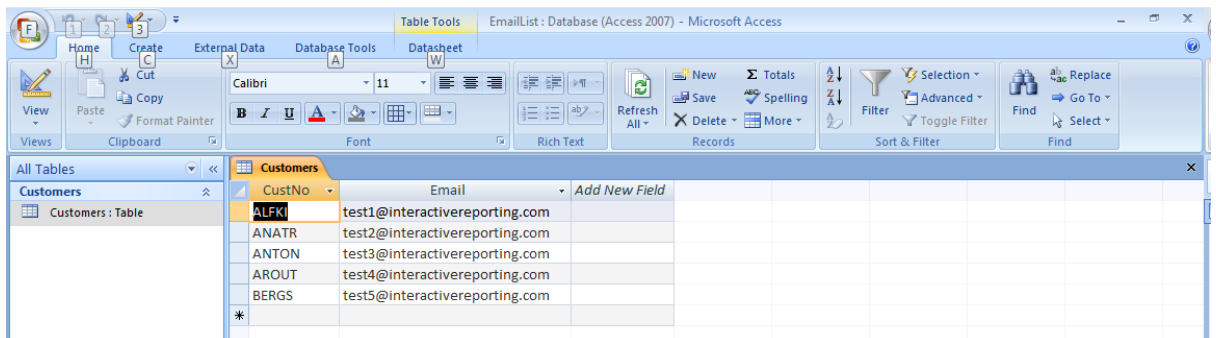

(Note filter on Customer 'Alfreds Futterkiste (ALFKI)')

2. Create a new database containing a list of unique identifiers/keys (e.g. CustNo) and emails associated with them
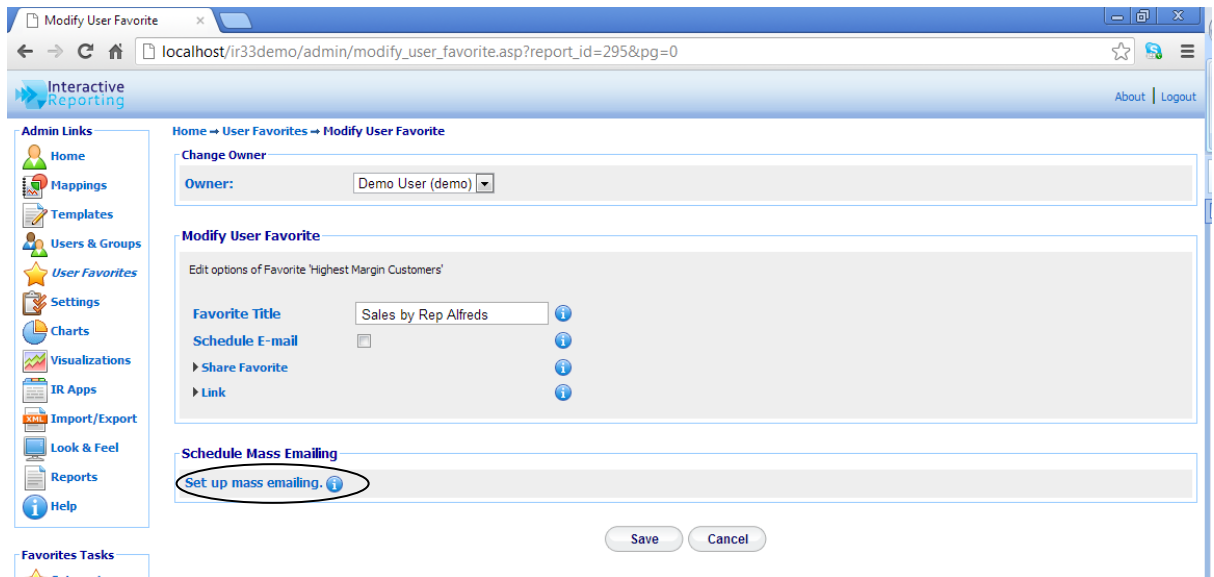

3. Create an ODBC driver to this new database e.g. 'alert_demo'
4. Log on to IR as admin

5. Go to 'User Favourites' and edit the favourite you just created

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6. Select 'Set up mass emailing.'

7. In 'Value to Replace' type the value of the key in Step 1 (e.g. If filtering on Custno then enter 'ALFI')
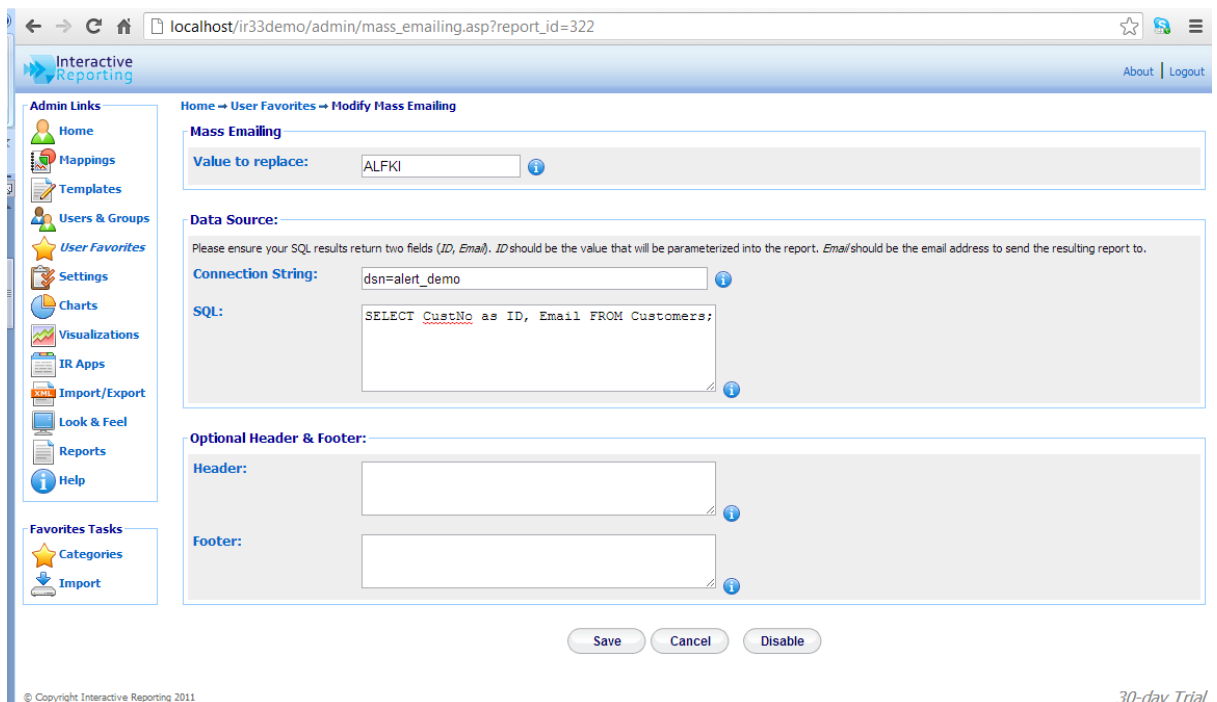8. In Connection String type the connection string to the new database of Email addresses (e.g. 'dsn=alert_demo')
9. In SQL type a SELECT statement to return the Key and Email from the table created in Step 2
10. Add any Header or Footer you would like to send with the email.
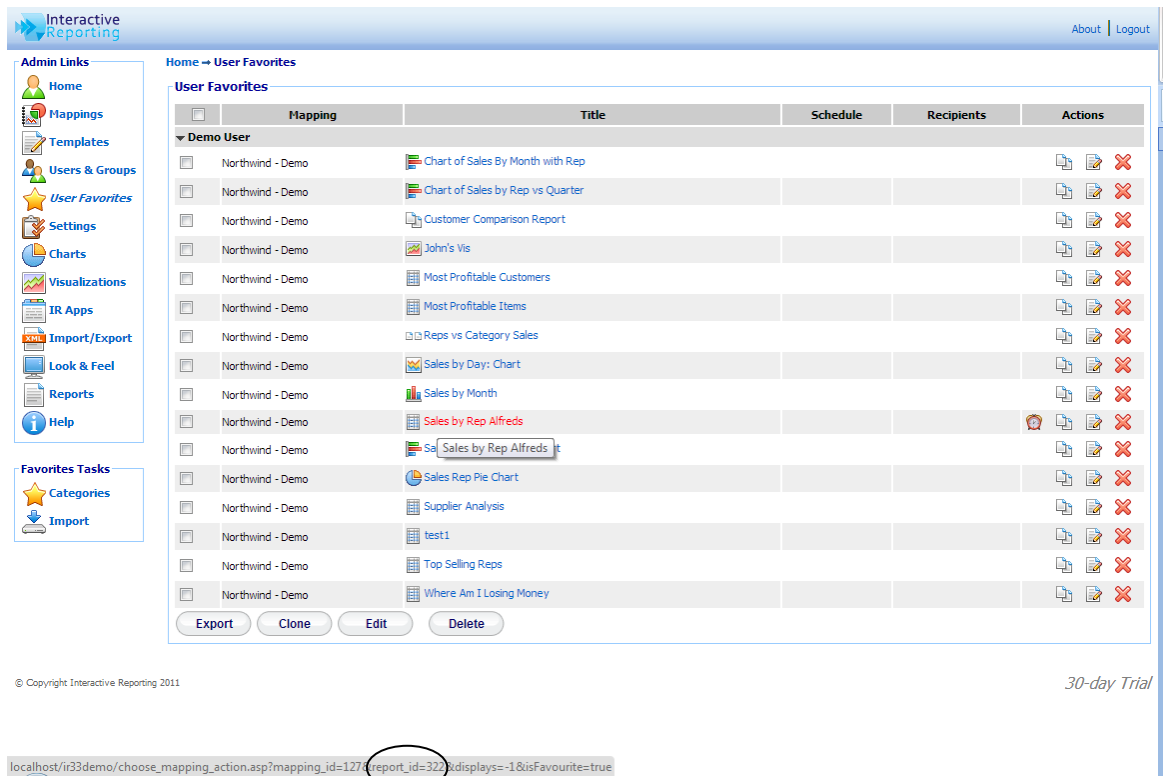   Note: Headers and Footers should be enclosed in the relevant html tags.

11. Click Save

12. Make note of report id. To do this, position the mouse pointer over the name of the report (do not click either mouse button). The status bar will display a URL that will hold the reference 'report_id='

13. Create a new text file in the emailer directory. Enter the following or similar syntax:

    %~d0

    cd %~dp0

    Emailer.exe -alerts -reportid 322

    <u>Where</u>

    emailer.exe   :   Calls the emailer application

    -alerts   :   Runs then Mass Alerts feature

    -reportid 322   :   The report id of the report you want emailed

    -oemail <u>user@example.com</u> : Can be used for testing purposes. This allows you to override the email address that all the reports would be sent to.

14. Save this file as a batch file (extension .bat) and add it as a scheduled task if required.

15. Alternatively you can use the pre made batch file called send_alerts.bat in the emailer directory to send ALL your alerts.

<u>For more information please refer to the Emailer Manual.</u>