

How to Send Bulk Emails?

What Is Bulk Email?

The Bulk Email feature allows you to send a single email to multiple leads at the same time.

Bulk emails help you communicate with multiple leads efficiently without sending individual emails one by one. They can be used to share updates, follow up with groups of leads, deliver important information, and maintain consistent communication across your contact database.

Bulk emails can be sent from:

- CRM Page
- Inbox

Note: When sending a bulk email, the system checks whether you have sufficient email credits available. If the number of recipients exceeds your available email credits, an error message will be displayed indicating that there are not enough credits to send the email. Additional email credits can be purchased from your Profile page if needed.

Send Bulk Emails from the CRM Page

1. Navigate to **CRM**.
2. Select the leads you want to email.

You may:

- Select individual leads.
- Click **Select All** to select all available leads.
- Use filters such as **Status, Source, Tags, Stages**, and other available filters to locate specific groups of leads.

3. Click **Email** from the top menu.

The email composer window will appear.

4. Enter or modify the email details.

You can:

- Select an Email Template.
- Choose an Email Signature.
- Insert Merge Fields to personalize the email.

- Modify the email subject.
 - Modify the email body.
5. Review the email content.
 6. Click **Send**.

The email will be sent successfully to all selected leads.

Send Bulk Emails from Inbox

1. Navigate to **Inbox**.
2. Click **Send New Email**.

The compose email window will appear.

3. Select the leads you want to email.
4. Enter or modify the email details.

You can:

- Select an Email Template.
 - Choose an Email Signature.
 - Insert Merge Fields to personalize the email.
 - Modify the email subject.
 - Modify the email body.
5. Review the email content.
 6. Click **Send**.

The email will be sent successfully to all selected leads.

Email Templates While Sending Bulk Emails

While composing a bulk email, you can select an existing Email Template.

1. Click **Select Template**.
2. Choose the desired template.

The template content will automatically populate the email editor.

You may modify the subject or email body before sending.

Email Signatures While Sending Bulk Emails

While composing a bulk email, you can select an email signature.

By default, your default signature will be selected automatically.

You may choose a different signature if required.

The selected signature will be included in the email before sending.

Merge Fields While Sending Bulk Emails

While composing a bulk email, you can insert Merge Fields into the subject or email body.

Merge Fields automatically replace placeholders with the corresponding lead information when the email is sent, helping personalize each email for the recipient.

You have successfully learned how to send bulk emails in AgentRoof CRM.

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