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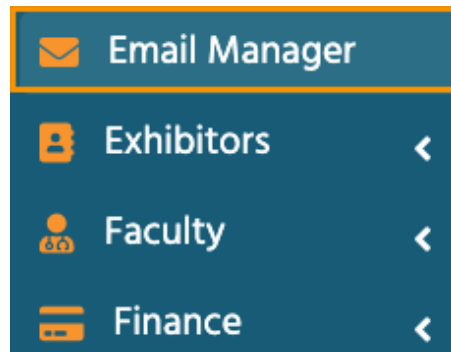
🔍 Search

Email Manager

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CloudCME® provides an easy way to manage and send emails using the **Email Manager**.

From the Main Menu, click **Email Manager**.

NOTE: Users must be given Administrative access to use Email Manager via **Administration > User Screen Access.** Look up the user by last name and check the checkbox beside **Email**. For Administrators in CloudCME®, **Email Manager** can be accessed by looking themselves up and checking the checkbox beside **Email**. This will update access, and the **Email** tab will be visible.

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Options & Search Tab

Abstracts Menu

Handouts

The **Options & Search** screen in **Email Manager** provides several options for building and generating an email list for an email campaign.

| Options & Search | Campaign List | Compose & Send | Campaign Statistics | Previously Composed Messages |
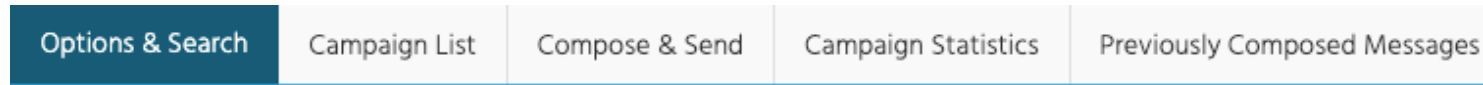
○ Upload a Purchased/External Email List

○ Search Existing Users

○ Reload a Previously Sent Campaign

○ View Previous Campaigns

- **Upload a Purchased/External Email List**

  If email lists have been purchased to use for marketing purposes, the lists can be imported here. The email list must include the user's name and email address. The name can be in a two column format - **firstname** (all one word) and **lastname** or a column labeled **fullname**. The **Email Address** column header should be named "**email**" and cannot be blank. This is a required column. Regardless of any other columns in the file, only the names and email addresses will be imported.

- **Search Existing Users**

  Existing users (users already in CloudCME®) can be searched to create a custom list using the **Search Existing Users** option.

  Enter the search criteria, and click **Search**. Search results will be displayed at the bottom of the screen. To add individuals to the campaign list, click the **Add to Campaign List** button.

Search Existing Users

Attended Activity		Activity Type	Specialty	Degree	Employment	Areas of Interest
Diabetes Care NY (2433) ▼	☐ Parents Only ⑦	-- Select -- ▼	▼	Check One or M... ▼	Select One ▼	CT Imaging ▼

▣

Only return users with credits between these
two dates: Department   Location   Roles   Profession

Between 4/15/2021   📅   and 10/26/2022   📅   [   ] [▼] [Administrators ▼] [3 items checked ▼]

☐ Exclude individuals already registered for the activity   ● ALL ○ US ○ Non-US   ☐ Only include users internal to your organization

[Search] [Reset] **1 individuals registered for Diabetes** Saved Settings: [Enter new setting name here and hit enter. ▼] [Save Settings] [Delete Settings]
Care NY who have roles 'Administrators' International
Users

[Add to Campaign List]

NOTE: Each time an option is selected on the screen, it will filter the list until the **Reset** button is clicked.

Campaign List Tab

The **Campaign List** tab displays all the individuals that returned in the search for existing users.

Options & Search	Campaign List	Compose & Send	Campaign Statistics	Previously Composed Messages

[Export XLS] Add Individual [☐] [+ Add to List]		[⊗ Remove Selected Users] [Clear Campaign]

Select	Full Name	Email	Remove From List
	[▼]	[▼]	
☐	Jennifer Donnelly	jdonnelly@).com	[⊗ Remove]
☐	Thomas Welch	twelch@).com	[⊗ Remove]

To add a user to the campaign list, enter their name in the **Add Individual** search box, select the name, and click **+Add to List** button.

Add Individual [Vassalle, Angela (4) avassalle@r   ☐] [+ Add to List]

The user will be added to the bottom of the **Campaign List**. To remove the user, click the **Remove** button in the right-hand column.

Options & Search	Campaign List	Compose & Send	Campaign Statistics	Previously Composed Messages

Export XLS	Add Individual	☐	Add to List		Remove Selected Users	Clear Campaign

Select	Full Name	Email	Remove From List
	▼	▼	
☐	Jennifer Donnelly	jdonnelly@......e.com	⊗ Remove
☐	Thomas Welch	twelch@_____.com	⊗ Remove
☐	Angela Vassalle	avassalle@r_____).com	⊗ Remove

To remove multiple users from the **Campaign List**, check the **Select** checkbox next to the user's name in the left-hand column and click the **Remove Selected** button. The users will then be removed.

Options & Search	Campaign List	Compose & Send	Campaign Statistics	Previously Composed Messages

Export XLS	Add Individual	☐	Add to List		Remove Selected Users

Select	Full Name	Email	
	▼	▼	
☑	Jennifer Donnelly	jdonnelly@_____.com	
☑	Thomas Welch	twelch@_____).com	
☐			

☑   Angela Vassalle   avassalle@ █████).com

Compose & Send Tab

Once the campaign list has been created, click the **Compose & Send** tab to compose an email and send it to the users on the campaign list.


NOTE: Files up to 500KB can be uploaded and attached to an email message.

- **Reload a Previously Sent Campaign**

  Another option for creating a campaign list is to reload a previously sent campaign. When selecting this option on the **Options & Search** tab, the screen will move to the **Campaign Statistics** tab to view a list of previously sent email campaigns. Select the email campaign and click **Reload**. Then, click **Compose & Send** to send the email.
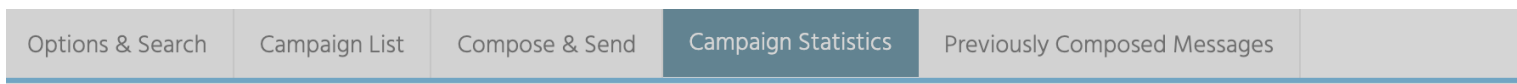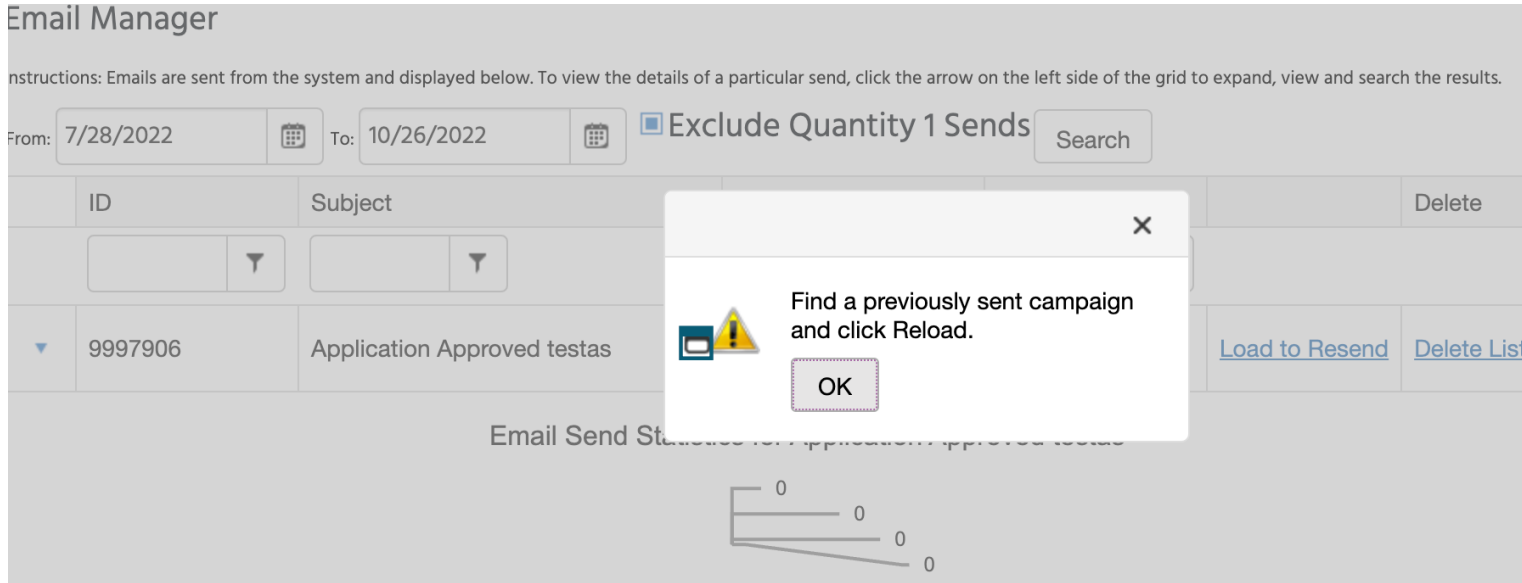
- **View Previous Campaigns**

  Select the **View Previous Campaigns** option to view a list of previously sent emails. Click the **Load to Resend** link, which will load the email addresses into the Campaign List. Then, click **Compose & Send** to send the email.

Campaign Statistics Tab

The **Campaign Statistics** tab displays a list of sent email campaigns, the date sent, and the number of recipients. The date range can be edited to search for email campaigns over a specific period of time. Also, an email campaign can be deleted from this screen.

For each email campaign listed, click the expand arrow beside it to see further statistics such as sent, soft bounces, bounces, and rejected. The list of email addresses will display the number of opens and clicks for that email address. Export the list to Excel using the **Export XLS** button.

▼	9997906	Application Approved testas	8/18/2022 8:15:46 PM	3	Load to Resend	Delete List

Email Send Statistics for Application Approved testas

```
          0
            0
              0
               0
```

— Sent
— Drops
— Bounces
— Rejected

Previously Composed Messages Tab

The **Previously Composed Messages** tab provides a list of unique previously composed messages that is searchable. Content can be copied and pasted from these emails to easily compose another email. Unneeded emails like tests or erroneous emails can be deleted as well.

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