


















Direct Mail

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This feature allows to send e-mails to selected contacts from CRM Contacts Directory.

Give access

First give access to e-mailing to JIRA groups in CRM Administrator menu / Access:

Products page access	 jira-core-users	 jira-administrators
	 helpdesk	 jira-servicedesk-users
Directories page access	 jira-core-users	 jira-administrators
	 helpdesk	 jira-servicedesk-users
Reports page access	 jira-core-users	 jira-administrators
	 helpdesk	 jira-servicedesk-users
Direct Mail	 jira-administrators	
View issue products&services	 jira-core-users	 jira-administrators
	 helpdesk	 jira-servicedesk-users

If no group is selected nobody will have rights to send e-mails to contacts directly from CRM Contacts Directory.

SMTP Settings

In CRM Administrator menu / Direct mail set your mail configuration:

Administration

Search JIRA admin

Applications

Projects

Issues

Add-ons

User management

System

CRM

CRM ADMINISTRATION

Access

Companies

Contacts

Products

Transactions

Custom directories

Import

Audit Log

Integrations

Direct Mail

SMTP settings

SMTP host

SMTP username

SMTP password

Notify if someone is unsubscribing

Notify if someone is unsubscribing - is the field for e-mail address where notifications will be sent when contact from the list unsubscribes.

Select Contacts

The user who has access to direct mail will see "Direct Mail" button after selecting one or more contacts from directory:

teamlead

Dashboards

Projects

Issues

Boards

Port

CRM

Add

Export

Direct Mail

Remove

Clear search criterias

Find Duplicates

CRM FUNCTIONS

Companies

Contacts

Products

Transactions

Directories

Reports

Feedback

Documentation

ab

↑

Alessandro

Andrey

Arkaitz

Denis

Dmitri

Fabian

Fabio

Fabrizio

Florian

George

Validation

After pressing "Direct Mail" button the dialog appears where you can select from two types of validation of E-mail addresses: Full and Quick.

Direct Mail

Selected 4 Contacts

1 of 4 E-mails were validated already

Estimate time:

Time spent:

Quick Validation

Full Validation

Close

Quick validation skips addresses which already have been validated with a previous full validation and runs a full validation for others.

Full validation takes more time and checks E-mail address not only against correct spelling with regular expressions but also checks the existence of the E-mail box with the address.

It is performed via MX domains checking and sending MAIL FROM commands via telnet.

In CRM Administrator menu / Contacts you can add attribute "E-mail is valid" where the results of last validation will be put:

Contact attributes						
Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
<input type="text"/>	<input type="text"/>	string (255 symbols) ▾	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add
Full Name	Full Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
E-mail is valid	E-mail is valid	E-mail is valid	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Группы JIRA	JIRA Groups	Jira groups	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Created	Created	Creator	Info	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete

Message Form

After validation fill in the form of message to be sent and press "Send E-mails":

Direct Mail

Recipients

4

Validated Recipients

0

Reply to E-mail*

e-mail where contacts can reply

Subject*

Body*

Send E-mails

Close

Unsubscribe

Unsubscribe link is added to every message automatically for contacts can decline receiving further direct mail messages.

To see which contacts had unsubscribe you can add Contact's attribute "No subscribe me" in CRM Administrator menu / Contacts:

Contact attributes						
Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
		string (255 symbols)		<input type="checkbox"/>	<input type="checkbox"/>	Add
Full Name	Full Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
E-mail is valid	E-mail is valid	E-mail is valid	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Группы JIRA	JIRA Groups	Jira groups	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Created	Created	Creator	Info	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete