

Travel Insurance and Registrations System (TIRS)

Email – Bulk Send

Version 1.0

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1.1 Bulk Emailing using On Demand Workflows

Microsoft Dynamics workflows can be used to send an email. This can either be triggered by a certain event or it can be performed as an 'On Demand Workflow' (where the user would select a number of people, and then click the 'Run workflow' button). The user could use the bulk send functionality when they want to send multiple emails at one time i.e. multiple applications have been approved and will not need to be individually edited.

 If a workflow has been already created it is a case of simply selecting the emails in a view (Travel Insurance > Emails (tile) > All Travel Insurance Emails (view)) that are displayed. Once you have selected the draft emails you want to send in bulk, select the 'MORE COMMANDS' button from the 'Command bar', and selecting 'Run Workflow'.

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~	Travel Insurance Application Approved - TI-000	Travel Insurance No-Reply	Carla Hadland KS - Testing	Kathy Shaw:	L Set Regarding	1	ial		Draft	06/06/	2018 11:52	6	06/ ^
~	Travel Insurance Application Approved - TI-000	Travel Insurance No-Reply	Carla Hadland KS - testing	Emma Jones		1	ial		Draft	04/06/	2018 08:26	6	04/
~	Travel Insurance Application for TI-0000010 Trip	Travel Insurance No-Reply	David Cont Trip to Australi		C Share	1	ial		Draft	22/05/	2018 12:07	k.	22/
~	Travel Insurance Application TI-0000281 KS - TE.	Travel Insurance No-Reply	Carla Hadland KS	Kathy Shaw	Email a Link		ial		Draft	21/05/	2018 20:35		21/
~	Travel Insurance Application TI-0000279 KS - Te	Travel Insurance No-Reply	Carla Hadland KS - Test By		Add to Queue	1	ial		Draft	21/05/	2018 19:57		21/
~	Travel Insurance Application TI-0000280 KS - re	Travel Insurance No-Reply	Carla Hadland KS - retestin	Kathy snaw	Run Workflow	1	ial		Draft	21/05/	2018 19:55	e,	23/
	Travel Insurance Application TI-0000245 Anoth	Travel Insurance No-Reply			Run Report		ıal		Draft	14/05/	2018 16:55	2	14/

The user can then choose from a list of On Demand workflows which can be performed against the records selected. For Travel Insurance, select 'UNIV – Send Draft Email'.

- Select the On Demand workflow you require to send the email to the selected records then click 'Add' and then confirm at the 'confirmation dialogue box' by clicking OK.
- Clicking 'Add' will cause the workflow to be processed -this will send the selected emails.

On Demand Workflows		
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Search for records	Q	
Name	Category	Created On Modii 🛛
orkflow - bhw - make email	Workflow	25/06/2014 16:47 11/12/201
end Draft Email	Workflow	15/05/2018 16:33 15/05/201
	Name prkflow - bhw - make email	Name Category orkflow - bhw - make email Workflow

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