

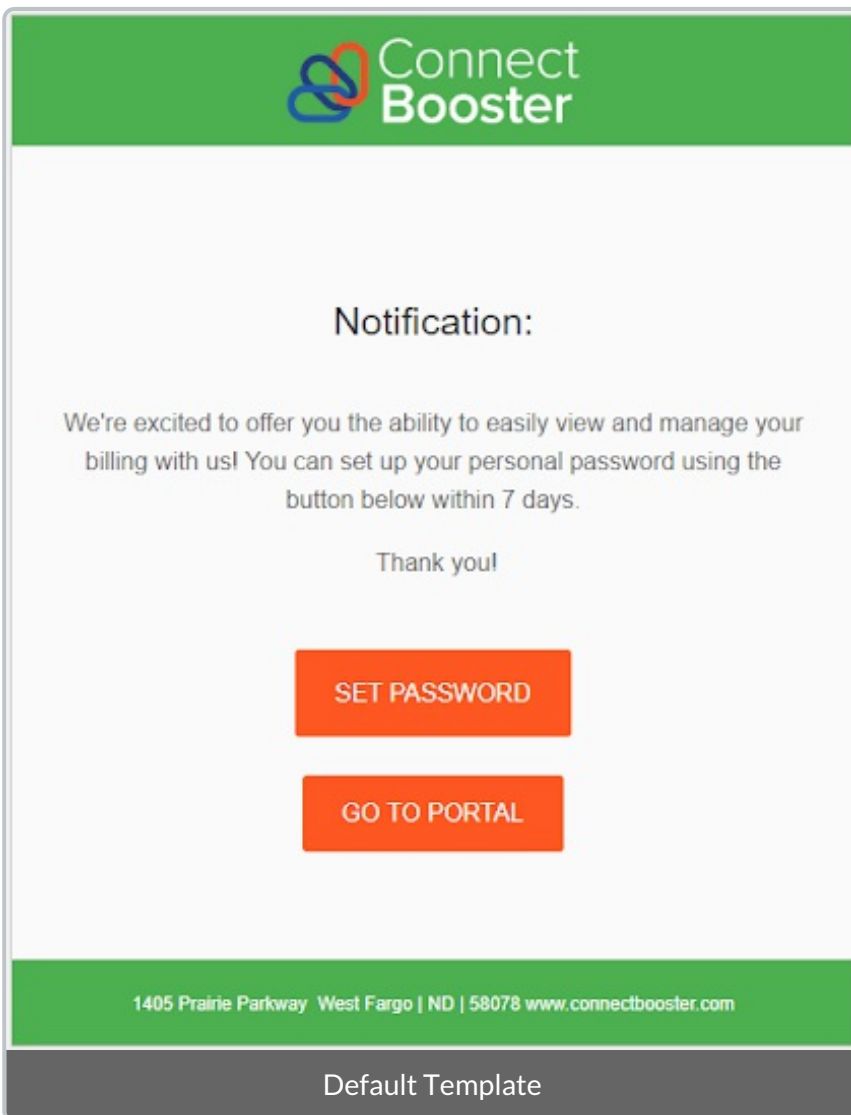
# Mass Client Adoption

Last Modified on 03/13/2019 10:31 am CDT

## May 23rd, 2018

### Welcome Email

With this latest ConnectBooster feature release, you can now invite customers to the portal in bulk with the new “Mass Welcome email” in a few simple steps!



### What this means:

- Faster client roll-out
- Better client adoption rate

- No 3rd party tool needed to send the communication

This feature makes for easier sales to new customers, help remove concerns about “How am I going to roll this out to my clients” and saves tons of time vs. sending to hundreds of clients one-by-one.

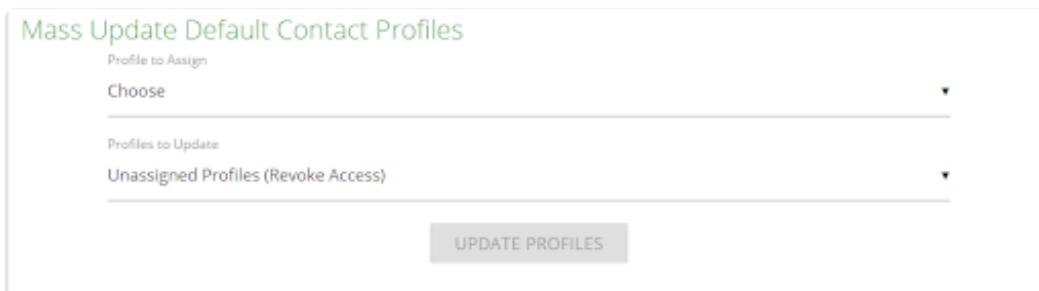
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## Part: 1 (preparatory step)

You can now update dozens, hundreds or thousands of contacts, with three clicks, instead of doing it one at a time!!

Mass Update the “**Default Contacts**” from all of your customers, (those who are already identified as being the primary contact(s) handling a given client’s billing).

Ex. the “Bill To” client on the ConnectWise company finance screen. Pick a security profile which will determine what functions of the portal will be available when the client logs in.



The screenshot shows a web form titled "Mass Update Default Contact Profiles". It contains two dropdown menus. The first is labeled "Profile to Assign" with the text "Choose" and a downward arrow. The second is labeled "Profiles to Update" with the text "Unassigned Profiles (Revoke Access)" and a downward arrow. Below the dropdowns is a grey button labeled "UPDATE PROFILES".

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## Part: 2

Send the contacts with an assigned security profile the “Welcome Email” en-masse!

## Mass Send Welcome Email

Choose an audience to receive the welcome email.

Recipients:

- Choose
- Manager
- User
- Level 3
- Level 4

SEND NOW

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## Extra release note:

Context based help links

Throughout the portal, we added additional links to support documentation to clarify features & functions.

[AutoPay Help ?](#)

[Billing Help ?](#)

[Client Email Help ?](#)

## To learn more:

Email Delivery Options: [Supporting article](#)

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