Global Updates for Opt-In/Out of Marketing

AgentMate allows you to batch update clients at a single time.
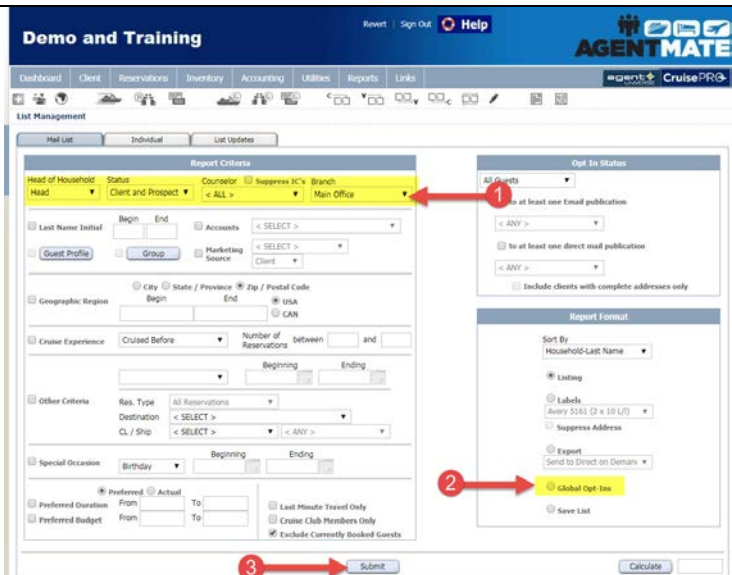
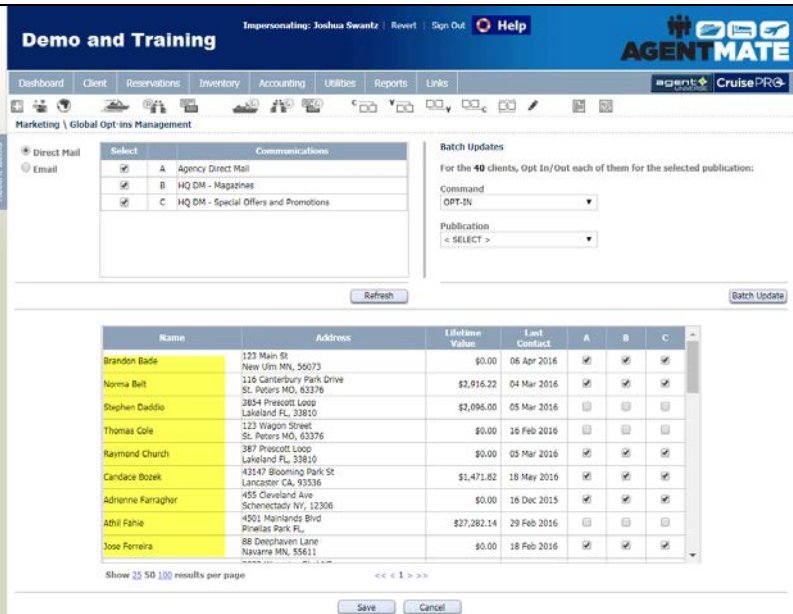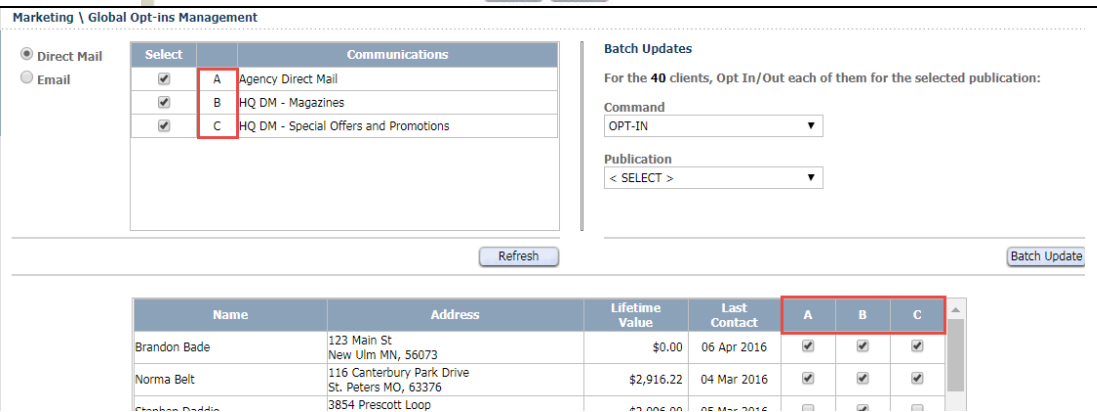|	
Step 1: To get started *Click* on the Client drop-down and Select List Management from the menu.	
Step 2: *Select* the criteria you want for the global update. Then, *Click* the radio button next to Global Opt-Ins *Click* Submit	
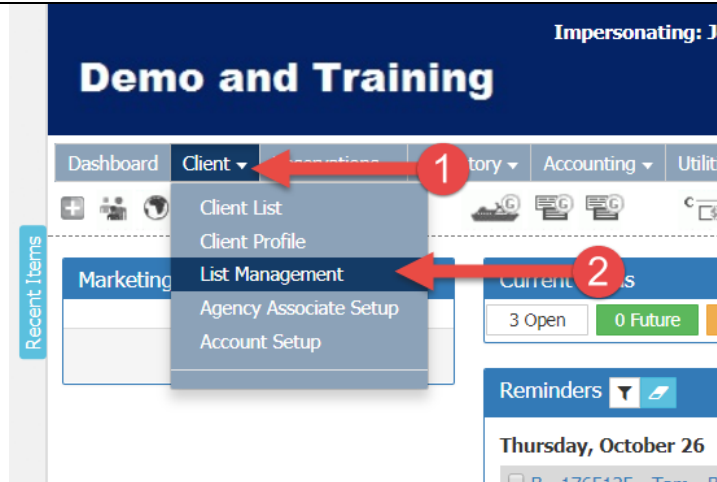
Step 3: You then see a list of customers that based off the criteria from the previous screen.	
Step 4: When making the selection for Direct Mail or Email there are Letters in the Communication section corresponds with the Letters for the client list. The client will have a check in their box If they're opted-in for the corresponding letters for Marketing. If they are not check then they're not opted-in	
Step 5: Here you can have the listed opted In or Out of Direct Mail or Email communications. In this example I've *Selected* the Direct Mail radio button. Note: The highlighted yellow in the Communications sections denotes the available Direct Mail options. Using the drop-down arrow for Command I've *Selected* Opt-In. Using the drop-down arrow for Publication I've *Selected* HQ DM Magazines. *Click* Batch Update	