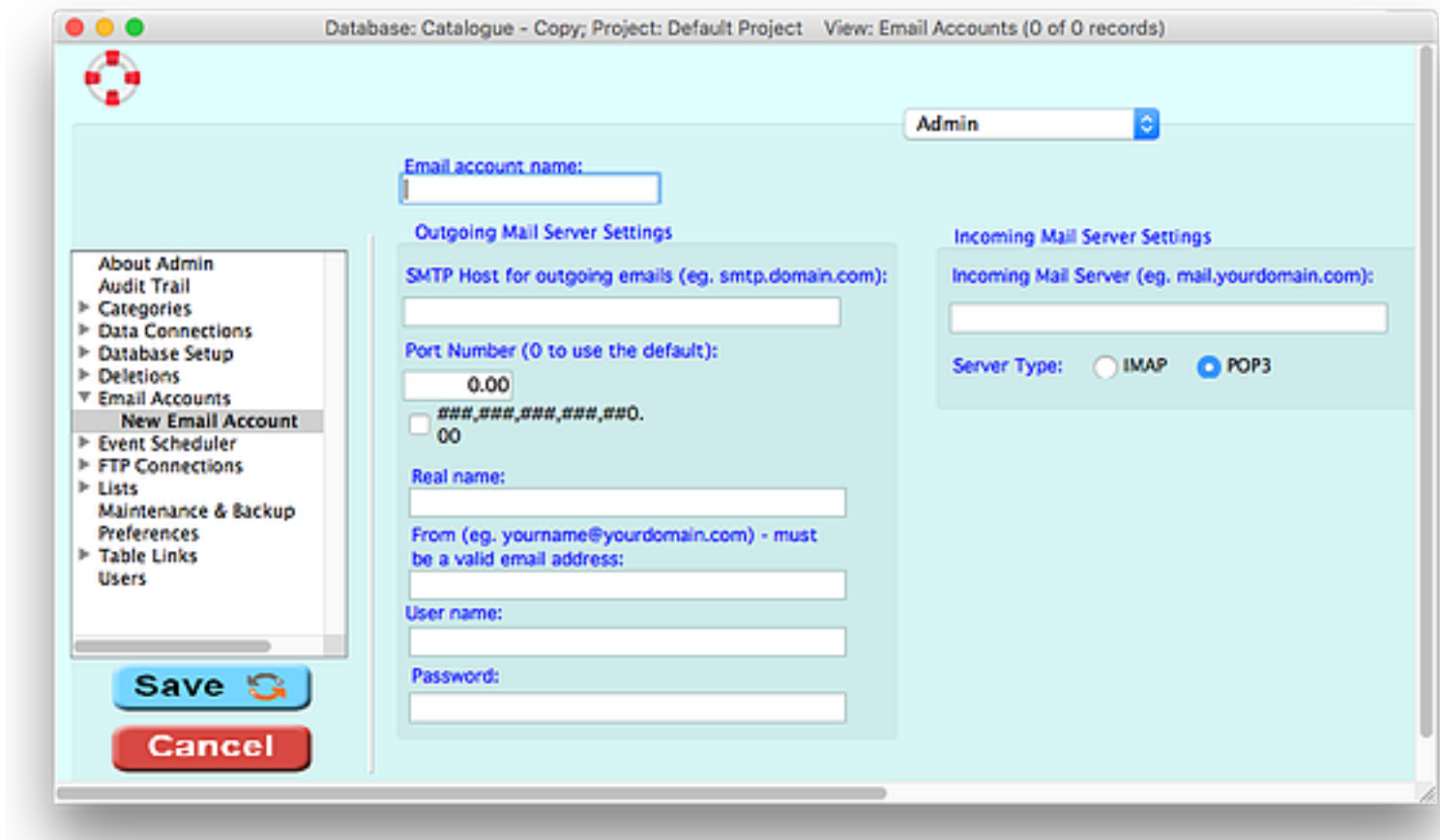# Sending Emails

If one of your data tables contains email addresses for your contacts, you can send customised emails to them.
You can send emails to contacts in your database.

- Send individual emails or to a selection of contacts
- Merge fields from the table containing the contact details, and related tables
- Add attachments
- Automatically create a Memo for each email that's sent

Email Account

To send emails, you must first set up an email account.

1. Go to the **Admin** menu.
2. Expand the **Email Accounts** topic on the left of the window.
3. Click on New Email Account.
4. Complete the new Email Account information:

The **POP Server**, **User name**, and **Password** fields are not required for sending emails;; they are required if you are going to use this account for receiving emails.

- Save the email account record

Now you are ready to create and send emails.

Creating an Email

1. Create a selection of the contacts that you want to send an email to.
2. Make sure that they all have an email address! If you need to create a new field for email addresses, choose **Table and Field Setup** from the **Admin** menu and add a new field to the table.
3. With the list of contacts displayed, expand the **Emails** topic on the left of the window.
4. Click the New Email option.
5. A new Email record opens:
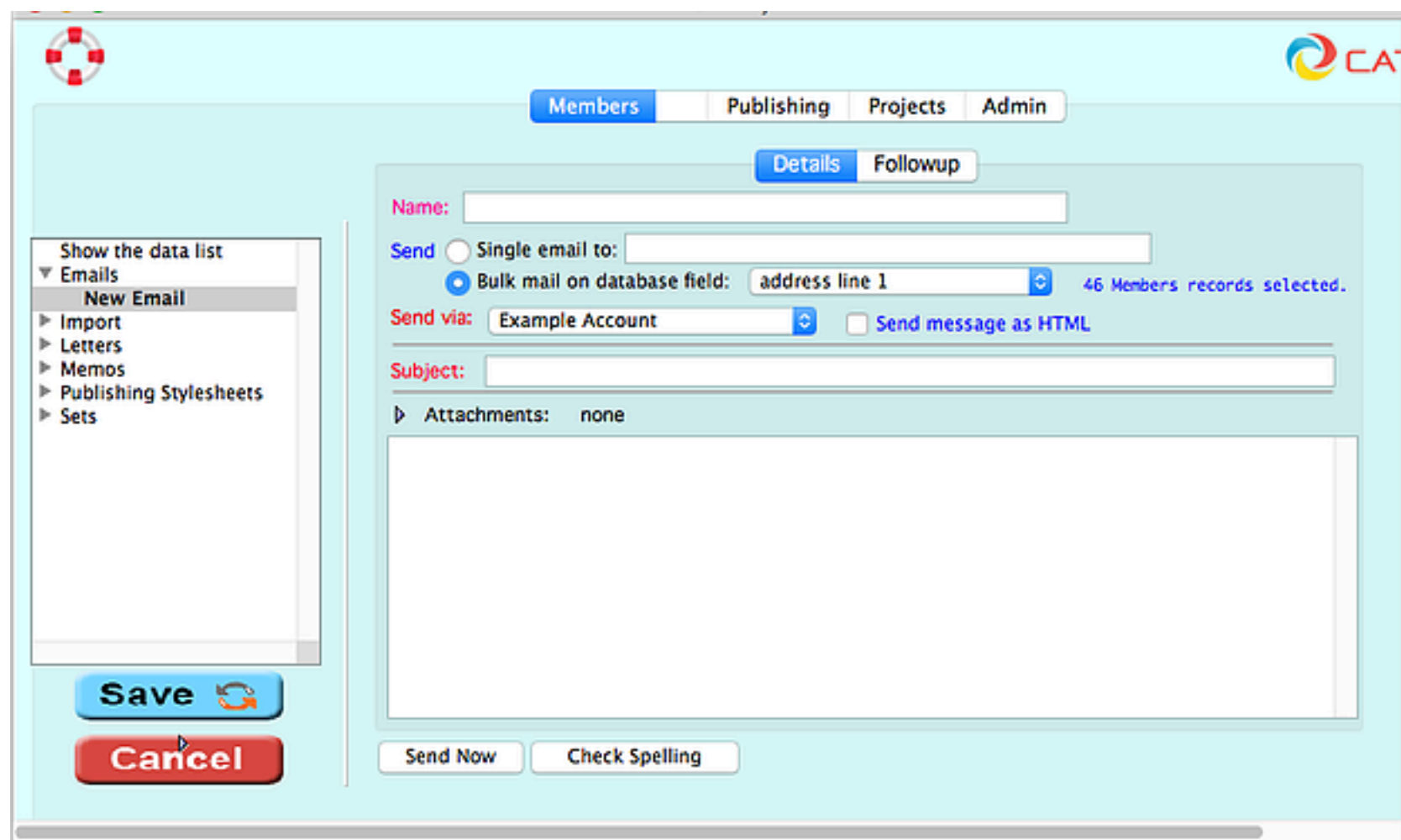
Notice the **Data Merge** floating palette off to the right of the Email window:
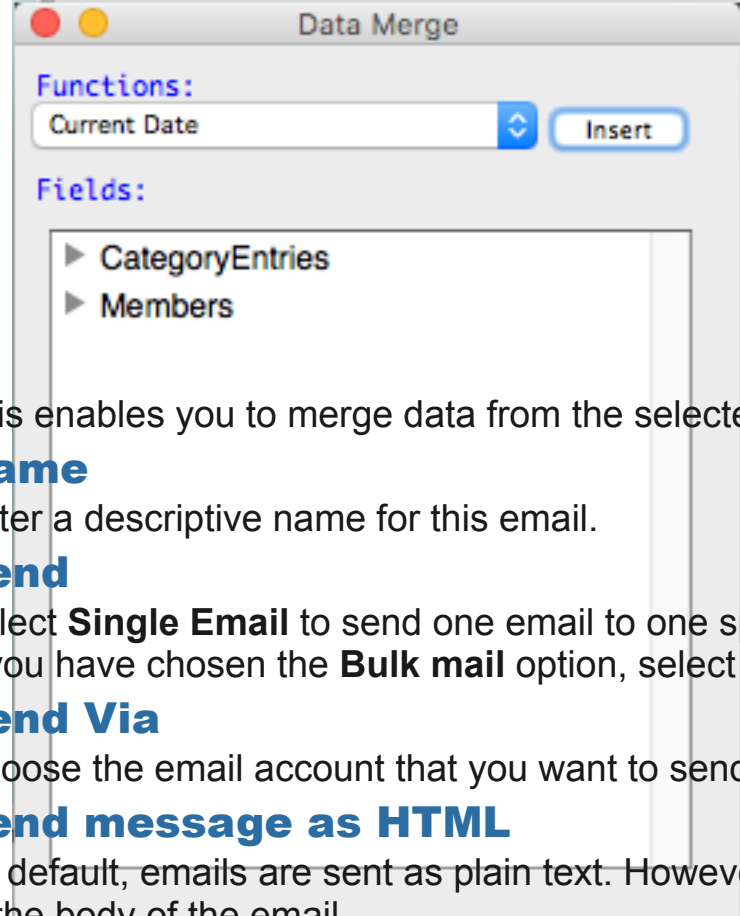
This enables you to merge data from the selected table (e.g., your contacts) and from related tables.

Name

Enter a descriptive name for this email.

Send

Select **Single Email** to send one email to one specific email address, or **Bulk mail on database field** to send an email to all the contacts in the list. If you have chosen the **Bulk mail** option, select the field that contains the email addresses from the popup menu.

Send Via

Choose the email account that you want to send this email from.

Send message as HTML

By default, emails are sent as plain text. However if you want to send them formatted with HTML, select this check box, and then include HTML tags in the body of the email.

Subject

This is what will appear in the Subject line of the emails.

Attachments

If you want to include one or more attachments, click on the little arrow to expand the **Attachments** area. You will then be able to add your attachments by clicking on the + button.

Message Body Area

Enter the text of your email into the message body area. You can merge fields from the database:

1. Make sure that the cursor is in the message body area, and that it's at the place where you want to insert a field.
2. In the **Data Merge** palette:
    1. Click the expansion arrow next to the name of the table that you want to merge data from. The tables listed here are the table that the email is based on, plus any related tables.
    2. You'll then see a list of the fields in that table.
    3. Double-click on the field you wish to insert. A special tag will be inserted into your email at the cursor position. For example:

Dear [!--[Members]First name--]

Now every email will be personalised with the contact's first name.

Check Spelling

Click this button to invoke the spelling checker..

Followup

You can choose to have a Memo automatically created for each email that is sent out. To do this, click on the **Followup** tab. The lower part of the window changes:

Create a Memo after each email is sent

Select this option to tell CatBase to create a new Memo for each record when the email is sent.

Followup Date

If you want to set a followup reminder date, enter it here, or leave if as 00/00/00 if you don't want a followup date. Or select the **n days after email is sent** option to set the followup date for a specified number of days in advance - this is useful if you're going to send this email more than once.

Brief Summary

This is what will appear in the Memo summary field which can be searched on - it's required.

Comment

Enter a brief description of the email here. This text will go into the Memo body.

Followup Action

Optionally choose a followup action from the popup list that appears when you click in this area.

Public/Private

CatBase keeps track of who created each Memo. If it is **Private**, only that person will see it; if it's **Public**, anybody will be able to see it.

When you're happy with your email, click **Send Now** to send it.