Creating an email

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Sending an email allows you to communicate with fellow members and contacts in your organization.

Note

Not all organizations permit members to send emails. If you do not have the ability to select recipients, you do not have the ability to send emails.

Sending an Email

There are several areas where you can send an email in MemberNova.

- Communication Area
- Events
- Groups

After you navigate to the area where you want to send an email from, you can create the email by clicking the button.

Creating an Email

1. On the left-hand side of the page, you will be able to enter the primary content of your email:
    - **Subject -** Enter the subject line/title of your email.
    - **Body -** Here, you can enter the main message of your email. You will have access to the online editor tools to include images, add links, as well as your own content.
        - **HTML Version** - The normal version of the email.
        - **Text Version** - The text version of the email. This is used for email clients that do not support HTML. You can click on the **Generate Text Version** button to copy the text from the HTML Version into this version.
    - **Attachments** - Click on the **Select Files for Upload** button to include attachments with your email. In the pop-up window, select the file to include as an attachment, then click **Open.**

    Note

    The maximum individual file size for attachments is 5 MB; The total file size for all combined attachment's is 6 MB per email.

2. On the right-hand side of the page, you will find the **Email Settings**, which allow you to configure various details of your email, including the recipients and sender profile, as well as inserting email templates and merge fields.

- **Templates** tab - Search for a template and click a template's name to replace the email's content with the selected template.

- **Fields** tab - Use the fields tab to insert **Merge Fields** which will populate the recipients', senders', accounts', or events' information.

- **Recipients** tab - Use Recipients to select an Email Channel, add Smart List(s), add Individual(s), as well as add Exclusion List(s).

    - **Email Channels** - Click the **Change** button to select which email channel will be used to filter out emails. Only individuals who have opted into the selected email channel will receive the email, regardless of if they are included in a selected Smart List.

    - **Smart Lists** - Click the **Add Smart List(s)** button to select which recipient smart lists will receive your email. The Plus or Minus buttons can be clicked to expand or collapse a smart list category.

    - **Individuals** - Click the **Add Individual(s)** button add a person/record or Recipient Profile to receive your email.

        - **Records** - Enter the person/record's name or email to find the recipient. Click on one of the results of select it to receive the email.

        - **Recipient Profiles** - Select the Recipient Profiles who will be receiving the email.

    - **Exclusion Lists** - Click the **Add Exclusion List(s)** button to select individuals who should be excluded. Selected individuals will not receive the email, regardless of if they were included in a selected smart list.

- **Options** tab- The options tab gives you the options to send the email using your own email address, custom sender, event organization, or select a sender profile. You are also able to copy yourself on the email, update the email's Preview Text, and schedule the email, or send it right away.

    - **Sender Information** - Allows you to set who the email sender will be and where the replies will be received.

        - **Me** - Emails will be sent from and replies will be directed to the email address of the profile used to send the email. Your own name and email address.

        - **Sender Profile** - Allows a Sender Profile to be selected and used to send out the email. Replies will be delivered to the sender profile's Reply To email address.

        - **Custom** - Allows a custom a name and email address to be used to send out the email. Replies can either be directed to the same email address as the sender, or to another custom email address.

    - **Email Options**

        - **Send me a copy of this email** - Allows a copy of the sent email to also be sent to you.

    - **Preview Text** - A short text snippet that will be displayed in the recipient's inbox after the subject line. This is display when the recipient is previewing the email.

- **Send Now or Later?** - Allows you to choose when an email will be sent.
    - **Send right now** - The email will immediately be sent once the Send button has been clicked.
    - **Schedule** - Allows you to specify a specific date and time. After clicking the send button, the email will be held until the specified time, where it will then be sent out to the selected recipients.

3. Once your email has been composed, the recipients have been selected, and any additional options have been configured, you can use the buttons on the top right to send or save the email:
    - **Save as Draft** - Saves the event invitation as a draft, so it can be returned to and further updated.
    - **Send to Myself** - Send a copy of the email to your own profile's email address.
    - **Send -** Finalizes the email and begins the process of sending the email to selected recipients.
4. If you clicked **Send**, the Send Email window will appear, which provides a quick summary of the email. Scroll down the window to review your email options or scheduled send time and make any necessary final changes.
5. Once you are ready to send the email, click on the **Send** button to finalize your email and send it to the recipients. If a scheduled date was entered, the email will be sent at the provided time.

Related Content

- How to email group members
- How to send emails to group members?
- How to send event emails and invitations
- How to use merge fields
- How do I schedule an email?
- How to add an attachment to an email
- How to send an email