# Send Bulk Email

| *Speech* | *Cursor Actions* |
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| Sumac can send bulk email to many contacts in your database. | |
| Before you can do this, your Sumac Administrator must configure the Sumac office record to be able to send bulk email. | |
| Let's say, for example, you want to send out your newsletter by email. | Open Contacts from the Console. |
| First, find the contacts who want to receive your newsletter. This is usually recorded as a Communication Preference. | Choose "Communication Preference" from Search Type drop-down. Then choose "Newsletter." <br> Click Search. |
| Now that we have the list of contacts who will receive the email, click the Send Email button. | Expand Email, and click Send Bulk Email. |
| This is a standard window for sending bulk email. | |
| Choose your office from the drop-down menu. This tells Sumac what office you are sending emails from, and what SMTP Server it should use for sending the email. | Choose "Canadian Web Hosting STMP" from Office drop down menu. |
| Sumac gets the default sender name and email address from the office record, and fills them in for you. Change them if, for this particular email, you need to specify a different sender. | |
| Enter the subject line for the email. | Enter subject line: Newsletter. |
| You now have the option of either using a template, or quick composing the message body for the email. Most bulk email is done using an HTML template, | Click Quick Compose radio button, then Template radio button. |
| since it gives you the flexibility of adding links, fonts, colors, pictures, and other formatting options, like the ability to insert information from the database about each recipient. <br> A Quick Compose message is just simple text. It is often useful if you are sending a quick note to a group of insiders – perhaps you board or employees. | |
| If you are using a template, click Choose to select the template you want to use. | Click Choose, and select template. |
| The Test button performs an instant mail merge on the template for testing purposes and shows you the result so you can ensure the template is merging properly. | Point to Test button. <br> Show template. |
| You can add any necessary attachment files to this email. | Click to expand Attachments, point at the Add button. |

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| Batch Scheduling and Port lets you specify how many emails go in a batch, and set up delays between batches to help you conform to your Internet Service Provider's guidelines. Some ISPs may specify that you should send no more than 300 emails per hour, or that they should be at least 10 seconds apart. Using these settings helps to ensure that you do not get flagged as a spammer for sending too many emails too quickly. Before you start sending bulk email on a regular basis, speak to your Internet Service Provider for guidelines on sending emails to large numbers of contacts so you can set up your Batch accordingly. | Point to Batch area. |
| Click Send, | Click Send. |
| and Sumac asks you to specify whether you want to save a communication record for each email that is sent. Usually you click yes to save a communication record, but note that you can click No if you do not want to. | Point at Yes and No. |
| When sending a newsletter, it is a good idea to take advantage of this feature to help you keep track of your outgoing communications, so for this example, we'll click Yes. | Choose Communication Type: "Newsletter." Click Yes. |
| The next window asks you where to save the email status report. This report confirms which emails were sent successfully, and gives a reason for the ones that were unsuccessful. | Click Yes. Save to Desktop. |
| Once you specify where to put this file, the emails are generated one at a time, and sent to the recipient contacts. While emails are being sent, a progress window appears in the bottom right corner of your computer screen. | Point to Progress window. |
| It indicates how many emails are being sent, how many have been sent already, and how many have yet to be sent out. If you close this window, Sumac immediately stops sending email, so it is important to leave this progress window open until the status indicates that Sumac has finished sending all the emails. | Point to three status fields. |
| Once Sumac has finished sending all the emails, it is a good idea to check the email status report to see if any emails were not sent successfully. | Open Status Report in a spreadsheet. |
| *Check out more training videos to learn more about Sumac.* | |