

Sending a Single Email to Contacts

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Donor Management System

After [adding a Contact](#), you can easily send a Single Email to one or more of them through your DMS directly. You can only send Single Emails to up to 50 Contacts at once. Consider using [DMS Mail to send Bulk Emails](#) when sending emails to more than 50 Contacts.

☐ Prefer to watch a [guided walk-through](#) of the sending single emails? Check out our [Communicating with your Donors Webinar!](#)

Sending Single Emails

1. Go to the **Contacts Tab**

2. Search for a specific Contact or select either:

- (1) **The specific Contacts** you wish to send Single Emails to, or
- (2) **Every listed Contact on the page,**

The screenshot shows the 'Contacts' tab in the Donor Management System. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for 'Settings | Help' and a 'DMSCA DMSCA' dropdown menu. Below the navigation is a search bar with the placeholder text 'Search by contact name or email' and a search icon. To the right of the search bar is a link for 'Advanced Search'. The main content area features a table of contacts. At the top of the table, there are controls for 'Actions', radio buttons for '4 Selected Records Only' (selected) and 'All 174 Records', and buttons for 'All contacts', 'Advanced Actions', and 'Add Contact'. The table has columns for Name, City, Province, Phone, Email, Date Created, and Last Modified. The first row is highlighted with a red box and a '2' next to it. The second row has a blue checkmark in the selection column. The third row has an unchecked checkbox. The fourth row has an unchecked checkbox. The fifth row has a blue checkmark in the selection column and a red box around it with a '1' next to it. The sixth row has an unchecked checkbox. The seventh row has a blue checkmark in the selection column. The eighth row has an unchecked checkbox. The ninth row has a blue checkmark in the selection column. At the bottom of the table, there is a dark grey bar with the text 'Select Contacts'.

	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A/Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreeatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

3. Select the **Actions** menu at the upper-left side of the Contacts list

4. Either type “email” or scroll down the **Actions** menu and select **Send Regular Email**

Note: You can also use DMS Mail to send Bulk Emails to multiple Contacts at once by selecting **Send Bulk DMS Mail**

The screenshot shows the Wellness Avenue interface. At the top, there's a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is present with the text 'Search by contact name or email'. Below the search bar, there's a table of contacts. The 'Actions' menu is open, and 'Send Regular Email' is highlighted. The table has columns for 'City', 'Province', 'Phone', 'Email', 'Date Created', and 'Last Modified'. A dark bar at the bottom of the screenshot contains the text 'Send Regular Email'.

	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>					May 6th, 2022 11:13 AM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>	Toronto	ON	416-872-9483	elize.farley@hotmail.com	Oct 8th, 2021 2:13 PM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>					Nov 25th, 2022 2:46 PM	Nov 25th, 2022 2:46 PM
<input type="checkbox"/>					Jan 31st, 2023 2:41 PM	Jan 31st, 2023 2:41 PM
<input checked="" type="checkbox"/>	Fedorchenko Vladislava	Toronto	ON	dada@gmail.com	Feb 28th, 2023 1:01 PM	Feb 28th, 2023 1:03 PM
<input checked="" type="checkbox"/>	Finley James	Toronto	ON	margo.mullin@gmail.com	Mar 31st, 2022 3:40 PM	Jan 26th, 2023 2:10 PM
<input checked="" type="checkbox"/>	Fred Jones	Vancouver	BC	6043517555 fredjones@gmail.com	Sep 23rd, 2021 11:00 PM	Jan 1st, 2023 12:58 AM
<input checked="" type="checkbox"/>	Gaby Mora	Montréal	QC	celinumber1@hotmail.com	May 12th, 2022 11:00 PM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>	Government of British Columbia				Dec 9th, 2021 9:14 AM	Jan 1st, 2023 12:58 AM
<input checked="" type="checkbox"/>	Gray Ring				Oct 6th, 2022 12:41 PM	Oct 6th, 2022 12:41 PM
<input checked="" type="checkbox"/>	Harry Trotter	Burlington	ON	012-345-6789	Sep 19th, 2022 11:45 AM	Sep 19th, 2022 11:46 AM
<input type="checkbox"/>	info@canadahelps.org			info@canadahelps.org	Feb 6th, 2023 1:23 PM	Feb 6th, 2023 1:23 PM
<input checked="" type="checkbox"/>	Irfan Haque		ON	irfanh@canadahelps.org	Jul 5th, 2019 12:54 PM	Feb 13th, 2023 4:49 PM

5. On the **next page**, you will see the following information:

Main Fields:

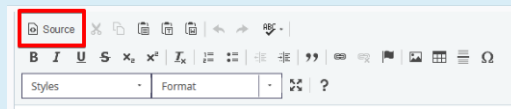
- **From:** which email address is used to send this Single Email.
 - Contact your onboarding expert if you have not yet set up a From Email address.
- **To:** the selected Contacts that will receive this Single Email.
- **Add CC:** add a Contact in the DMS to receive this Single Email as CC.
- **Add BCC:** add a Contact in the DMS to receive this Single Email as BCC.
- **Use Template:** select an already created Template or create a new one by selecting **Save As New Template** at the bottom of the page or by going to **Settings > Communications > Message Templates**.
- **Subject:** the subject of this Single Email.

- **Merge Fields:** formerly known as DMS Tokens, they can be used to automatically include information from a Contact in emails (e.g. “Dear **{Contact First Name}**”)
- **Campaign Group:** legacy field not in use add the moment. Please ignore it.
- **Save As New Template:** save the created contents of this Single Email as a new Template.

HTML Format (Rich-Text)

- Compose your email using this standard formatting tool that uses rich-text (e.g. bold, italics, etc.).
- *Optional:* you may wish to paste HTML code within the Source of the email editor:

o



Plain-Text Format:

- If you prefer, you can use this formatting tool that only uses simple-text.

Attachment(s):

- You can upload up to 3 different files.
- Each file must be less than 3mb in size.

Schedule Follow-up:

- You can also create an Activity to be assigned to any DMS User when sending this Single Email.

Send Email Cancel

Email will NOT be sent to 5 contacts - (no email address on file, or communication preferences specify DO NOT EMAIL, or contact is deceased).

From * "Wellness Ave." <wellnessave@canadahelps.ca>

To * "Irfan Haque" <irfanh@canadahelps.org>
"Gaby Mora" <celinumber1@hotmail.com>
"Fedorchenko Vladyslava" <dada@gmail.com>

Add CC Add BCC

Use Template - select -

Subject * Spring Fundraiser Volunteers Needed <> Merge Fields

Campaign Group - select Campaign Group -

HTML Format

<> Merge Fields

Source | X | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Link | Unlink | Image | Table | Merge Fields | Styles | Normal | ?

Hi Team,

I hope everyone is having a lovely week! I just wanted to reach out ahead of our Spring Fundraiser to if any of you would be willing to lend a hand with this year's preparation. Your incredible support last year was fundamental in making our fundraiser a raging success!

Feel free to reply if you'd like more details about this year's volunteer schedule.

Kindly,
Sarah Parker, Fund Development ManagerWellness Ave

body p

Plain-Text Format

Save As New Template

Attachment(s)

Attach File	Choose File No File Chosen	Description
Browse to the file you want to upload. You can have a maximum of 3 attachment(s). Each file must be less than 3M in size. You can also add a short description.		
Attach File	Choose File No File Chosen	Description
Attach File	Choose File No File Chosen	Description

Schedule Follow-up

Schedule Follow-up Activity - select activity - on [calendar icon] [calendar icon] [clock icon]

Subject [text input]

Assigned to - select Contact -

Email will NOT be sent to 5 contacts.

Send Email Cancel

6. Fill out all mandatory fields and compose your email

7. You can also use an existing [Template](#), or save the contents of your newly composed email by selecting **Save As New Template**

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Send Email Cancel

Email will NOT be sent to 5 contacts - (no email address on file, or communication preferences specify DO NOT EMAIL, or contact is deceased).

From * -select-
 Acknowledgement Email - Yearly
 Acknowledgement Receipt - Single transaction
 Attachment Test
 Basic - Thank You Email
 Dedication Letter for Printing
 Donation in Memory Template
 Donor Re-engagement Template
 First-Time Donor Thank you
 General Thank you
 Letterhead
 Test
 Thank you - Cheque Donations
 Thank you - Dedication message
 Ukraine Donation Thank You
 Volunteer Reach Out General
 Year In Review- 2022

To *
 Search

Use Template

Subject * Your Generosity Has Allowed Us to Move Mountains </> Merge Fields

Campaign Group -select Campaign Group-

HTML Format

</> Merge Fields ?

Source | X | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent | Outdent | Link | Unlink | Table | Table of Contents | Styles | Normal

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Kindly,

body p

Plain-Text Format

Save As New Template

Attachment(s)

Use an existing template or save your copy as a new template

8. After all the necessary information is added, select **Send Email** on either top or bottom of the page to send the Single Email to the selected Contacts.