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# DAY 3 POWERBASE TRAINING CHEAT SHEET

## MAILINGS

Many configurations and checks must be performed before you can send out emails.

### Set-up

To Edit your Domain information

PATH: **Administer CiviCRM > Configure > Domain Information > Fill-in Required fields: Domain Name, FROM Name, and FROM Email Address**

To Edit your Default email address

PATH: **Administer CiviCRM > Configure > From Email Addresses > FROM Email Address > Edit your Default email address to your preference**

To set up where your email is captured

PATH: **Administer CiviCRM > CiviMail > Mail Accounts > Eventually set this up to your own server. PTP will help you configure this in the future**

To create templates for the headers, footers and other messages for your emails

PATH: **Administer CiviCRM > CiviMail > Headers, Footers, and Automated Messages > Edit to Create Templates for your own Headers and Footers**

### Basic Mailings

PATH: **CiviCRM Home > Find Contacts > Select Records > Check box "Selected records only" > more actions > Send Email to Contacts > Go > Fill-in Required fields in Send an Email**

**Hint: Tokens are a great way to add information from your PowerBase into the body of your email.**

**More info: <http://wiki.civicrm.org/confluence/display/CRMDOC/Mail-merge+Tokens+for+Contact+Data>**

You can email **Contacts** by following the **CiviMail** wizard

Basic PATH: **CiviCRM Home > Contact Search > Summary > Send an Email** then follow the wizard

If you would like to send out an email to a group of people;

**Create a Group > Select all records > Schedule/Send a Mass Mailing > Follow** the wizard

### Mass Mailings

Basic PATH: **Create a Group > Select all records > Schedule/Send a Mass Mailing > Follow** the wizard

Detailed PATH: **CiviMail > New Mailing > Select Groups > Track and Respond > Mailing Content > Test Email**