Doteasy KB

How do I create Mail Groups?

Doteasy SmartMail allows you to assign email contacts into categories. When you are composing an email, you can select the email recipients based on the categories you have set up.

To assign a contact to a category:

1. Login to your Doteasy SmartMail system.

2. Click on My Contacts under the Contacts section on the left-panel.

3. Click on the contact you wish to assign to a category.

4. Then, click on the Categories tab.

5. Check the box for the category you wish to assign this contact to.

6. Click Save to save changes.

To setup a new category:

If you wish to assign a contact to a category that has not been set up yet, you will need to create the category.

1. Under the Edit Contact page, click on the Master Categories icon.

2. Enter the name of the new category you wish to create. Separate each category with a comma (",").

3. Click OK when you are ready. The new category will be added under the Categories tab.

4. Check the box for the category you wish to assign this contact to.

5. Click Save to save changes.

To send an email to contacts in a group category:

1. Click on New Message in the left-panel. This will open up the New Message Composition window.

2. In the email recipient field, click on the To link. This will open up your address book.

3. Under the Contact Lists drop-down menu, select the category to which you wish to send the new email.

4. If you wish to send the email to all contacts under the group category, check the checkbox next to Display Name.

5. If you wish to send the email to selected contacts under the group category, check the checkbox next to the individual names.

6. Click OK when you are ready.

7. The contacts will then be automatically added to the To field.

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