



Custom Categories & Emails



Custom Categories & Emails

When you have hundreds of contacts that you send regular correspondence to, for example a monthly newsletter or an open house invitation, with Homes Connect you have the option of easy contact access using our custom category application.

To setup the Custom Categories, please see Article: **Create Your Own Custom Contact Categories** and do this for all of the contacts that you would like to save for future emailing purposes.

When you would like to send emails to these clients choose the email template that you would like to send to your clients and then hit Select Recipients. That will open a new window with all of your contacts.

Send Email

Send Options

Send Message From:

emailaddress@gmail.com

BCC Sender

Send Message To:

[Select Recipients](#)

Custom Categories & Emails

This window has the option of searching your contacts and here is where labeling your contacts with categories comes in handy! Use the dropdown to select your new category.

Custom Categories & Emails

Search Contacts

Last Name

First Name

Category

- All Categories
- All Categories**
- Attorney
- Broker/Realtor
- Buyer
- Home Buyer

Email

Home Buyer

Interested Buyer

First Name Last Name

Insert New Contact

Name*

Email*

Phone

Company

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Once the Category is selected and you have hit Search, you should see all of the contacts that you have assigned and can then Select All, or select the ones from this downsized list that you want to send your email to.

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Search Contacts

Last Name	First Name
<input type="text"/>	<input type="text"/>
Category	Email
<input type="text" value="Buyer"/>	<input type="text" value="name@domain.com"/>

2 Contacts Match Your Search

[Unselect All](#) [Select All](#) ⓘ

Home Buyer Interested Buyer

Insert New Contact

Name*	Email*
<input type="text"/>	<input type="text"/>
Phone	Company
<input type="text"/>	<input type="text"/>

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You should see all of your clients in the Select Recipients list. Once you have completed the email to your satisfaction, hit Send Message to send your email out!

Send Email

Send Options

Send Message From:

emailaddress@gmail.com

BCC Sender

Send Message To: [Select Recipients](#)

timbrownsellstate@gmail.com,
Interested@Homes.com