

How to send a Group Email from Activity

April 2005

This SOS quick Tip will take you step by step to do the following:

- 1: Email Setup
- 2: Add Members to an Activity
- 3: Send an Email to current Activity
- 4: Technical Support

1: Email Setup

1: From the General Family screen, select Administration, then Program Admin. Then click on Database Connection.

Enter your SMTP name in the appropriate field. You may have to check with your Technical Support staff to determine the entry. It could be the same as what's in your email client.

The screenshot shows a window titled "PROGRAM ADMINISTRATION" with a menu bar containing "File" and "Help". Below the menu bar are three tabs: "Defaults", "Database Connection" (which is selected and highlighted with a dashed border), and "Accounting Connection".

The "Database Connection" tab contains several sections:

- Administrator Information:** A table with fields for SOS Serial Number (11-333-555-777), Salutation (Very truly yours), Full Name (Leonard Ansin), Position (President), Organization (Membership Organization), Address (2905 Walnut Ave), City, St, Zip (Schaumburg, IL 60173-4758), Telephone (847.517.1200), and Fax (847.517.1206).
- Database Setup:** Fields for Computer Date (02/10/2005), Time (07:04:09 AM), and SOS Database Files (P:\SOSGBWData).
- Email Setup:** Fields for SMTP Name (192.168.1.2) and IP Address (empty).

At the bottom of the window are two buttons: "Update" and "Close".

2: From the General Family screen, select Management, then List Admin. Be sure you have sender email addresses entered. The fields in Red are required.

Sender Email Addresses are required so the correct name will appear as the sender of your email and this is where the recipient will reply.

LIST ADMINISTRATION

File Help

Choose to Add or Revise Items

Name	Email
Leonard Ansin	lansin@ansint
Elizabeth Ashton	eashton@orga

List Options (by Section)

- City State Zip
- State
- Country
- Marital Status
- Member Types
- Occupation
- Titles
- Activities
- Activity Status
- Follows
- Raised In
- Member Attributes
- Email Addresses
- Class Type
- Schools
- School Classes
- Tutors/ Teachers

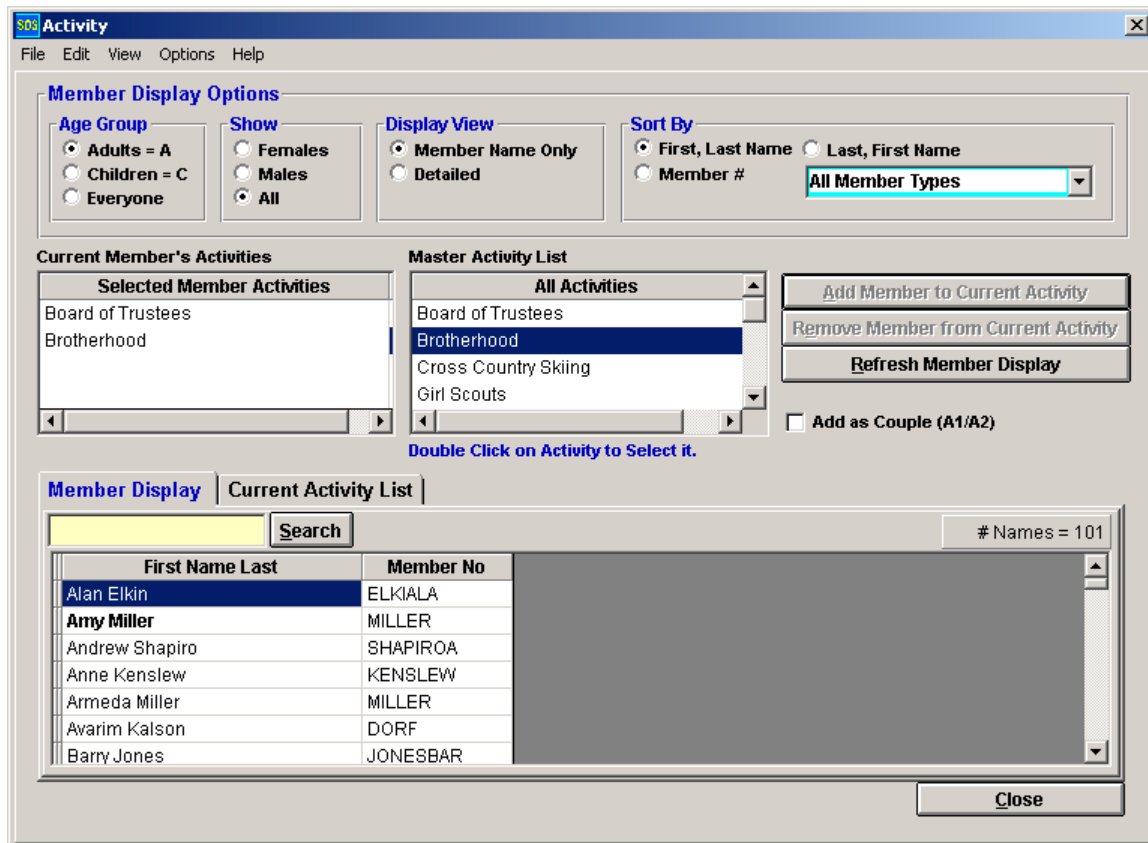
Data Entry is Required for Fields labeled in Red

First Name	Last Name
Elizabeth	Ashton
User Name	Email Address
eashton	eashton@organ.org
Position	<input type="checkbox"/> Does not receive Web Email
Administrator	

2: Add Members to an Activity

From the General Family screen, select Management, then Committees or press the F5 hot key. Be sure you have recipient email addresses entered. These are entered through the Family member screen and for each member.

- 1: Open Activity Lists, and Refresh the Member Display
- 2: Double Click on an activity from the All Activities List, to make an activity current
- 3: Double click on a name to be added to the current activity
- 4: If you want to receive a copy of the email, in your client email (such as Microsoft Outlook or Eudora), add yourself to the Activity.
- 5: Under Options you can Add a New Activity
- 6: Select File then Print or use the Ctrl P hot keys



3: Send an Email to current Activity

- 1: Select Activity Printing,
- 2: At the bottom of the screen, check whether to use Family Email if personal Email is blank or if you uncheck the box, the program will only send an email if the person has a personal email address. Then click on Emil Option.

Print Activity

File Help

Selected Activity - Board of Trustees

Print What

- Members Associated with Selected Activity
- All Members Associated with All Activities
- One Letter Per Family for Members associated with Selected Activity
- Members Not Associated with selected activity

Sort by

- Member #
- Last Name
- Activity

Display What

- Member #
- Member Name
- Address
- Telephone
- Email
- Activity

Click on Print Preview to Complete Export

Export ?

Yes No

Print How

- List Format
- Labels
- Letters **Margins**
- Email

Orientation

- Landscape
- Portrait
- Print Envelopes

Address / Letter Salutation Option

Mr. Bob Jones

Main Screen Letter Salutation

Letter Date and Subject

05/09/2005 Include Hebrew Date

30 Nisan 5765

Board of Trustees

Store Query

Use Family Email if Personal Email is Blank

Document Editor Print Preview

Close

- 3: At the Email screen, select the sender email address from the Email User Accounts. (Required)
(The senders name and email address are entered in List Admin)
- 4: Enter the Subject and text of the email. (Required)
- 5: If you want to include an attachment, select attach at the top of the screen and navigate to the folder where the file is located.
- 6: Be sure the SMTP server name is filled in (Required)
(The default information is entered in Program Administration)
- 7: Depending on your email configuration, if a user name and password is required enter it in Mail Server Authentication section.
(See your network administrator for specific details)
- 8: When you are ready to send your group email, click the send button at the top of the screen.

The screenshot shows a window titled "SOS Email to 3 member(s) of Board of Trustees". The window has a menu bar with "File", "Options", and "About". At the top right, there are buttons for "Remove", "Attach", "Send", "Clear", and "Exit".

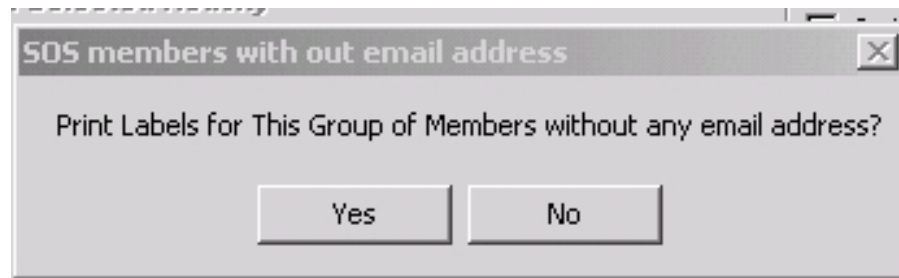
The form is divided into several sections:

- Organization Information:**
 - E-Mail (SMTP) Server Name: ansintech.com
 - Organization Name: Congregation Shalom
 - Telephone: 323-876-8330
- Email From Information:**
 - Email User Accounts: Sedwards@msn.com (dropdown)
 - Sender: Sarah Edwards
 - From (Your e-mail address): Sedwards@msn.com
 - Position: Network Admin
 - Mail Server Authentication:
 - User Authentication
 - User: [text box]
 - Pass: [text box]
- Email Delivery Information:**
 - Recipient's Name: Sally Hale (dropdown)
 - To (Recipient's e-mail address): [text box]
 - You are going to automatically send this email to 3 member(s).
- Email Message:**
 - Subject: Board of Directors Meeting
 - Message: There will be a board meeting on Tuesday April 15, 2003. The agenda is attached in a Word format.
 - Attachment: N:\Corres0_S\SOSLAdocs\THOUGHTS.doc

- 9: The email program will loop through the names and send the email to each one of the recipients. If the email list is quite long, this may take a few minutes. Each recipient receives an individual email. They do not see all of the recipients on the list.

10: If any email addresses are incorrect, the senders Client email should receive notification.

11: When the process is complete, and you click on the exit button, a screen will pop-up asking whether you want to print labels for those recipients of the current Activity, who do not have an email address. The screen would appear as follows:



4: Technical Support

1: Each time a group email is sent, a log file is created in the current application folder. The file name is SMTPMulti.LOG. This will display the process of sending email.

2: Another log file in the current application folder, EMAIL.LOG lists the email addresses and names from the latest group/activity email.

Please note: You should check with your ISP, to determine how many emails they will accept at any one time. You may have to setup several activities, to accommodate the maximum number of emails per connection.

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to SoSSupport@ansintech.com or SoSrequest@ansintech.com

For more details about SOS visit our web site at www.ansintech.com

SOS How to send a Group Email last reviewed April 2005

Technical support toll free number is 1-866-322-4530

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