

## CONTACT TRAINING

*infoodle*  
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*SENDING EMAILS*  
**STUDENT HANDBOOK**

**2**  
**LEVEL**

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STORE

MANAGE

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# INFOODLE CONTACT TRAINING

2

You should first complete infoodle contact training level 1. In level 1 we looked at the basics of sending an email to individuals and groups, adding an attachment and creating your own signature. Level 3 will cover sending texts, letters and labels

## Save to draft

### From the email content page

If for any reason you need to leave this page, you can save the email you are working on and come back to it later.



The system automatically saves by clicking on **save now** your email is saved to draft. When a save is done, you will see **saved** appear.

## Retrieving an email from draft

Click on the **draft** tab.



You will see a list of all your emails in draft. Select **edit** to carry on or delete the email by clicking on **discard**. You will be taken back to the content page. Select **content** and you can start working on the email.

Inbox	Draft	Send From	Send to	Content	Attachments	Signature	Send	History	
<input type="checkbox"/> Select bulk action    0 items selected									
To	Subject	Message						EDIT	DISCARD
<input type="checkbox"/> Worship 1st Service Team [5]		Dear {first_name} this is a test sent on {date}						EDIT	DISCARD
<input type="checkbox"/> Interns [3]	This is an email during training!	Hi {first_name}, This is an email I am writing this is an image kjh jdf ldsfgh ljdsfg hjfdgh lkjdsfg hlksdfhg lkjdsfgh lkj...						EDIT	DISCARD
<input type="checkbox"/>	infoodle test email	Dear {first_name}, This is my first test email. this id just p e ncoenkcnmnn						EDIT	DISCARD

## Save as template

Type in the template name. (Text box at bottom of content page)

If you need this template available to others in your organisation, tick system template. Then Save. The ability to save as a system template is limited to certain people based on your role.

Next time you want to use this email template, select from the template drop down list. By clicking on new you will be given a new blank page. By clicking on delete the template will be deleted.

## Selecting a filtered group

The screenshot shows the 'Send to' interface. At the top, there are tabs: 'Inbox', 'Draft', 'Send From', 'Send to' (highlighted), 'Content', 'Attachments', 'Signature', 'Send', and 'History'. Below the tabs, the 'To' field contains 'Lifegroups [32]'. A dropdown menu is open, showing 'Choose a filtered group' and 'Lifegroups [32]'. Below the dropdown, there are three options: 'Which function to include' with a dropdown set to 'Leader', 'Which skill to include' with an empty dropdown, and 'Include subgroups' with a checked checkbox. An 'ADD' button is at the bottom right.

From the Send to page:

**Step 1:** Choose from the drop down a **filtered group**.

**Step 2:** Select the group (example lifegroups).

**Step 3:** Select the function (example Leader).

**Step 4 :** Select sub groups, (example all the leaders are all in a sub group of the Life Groups).

**Step 5:** Click add.

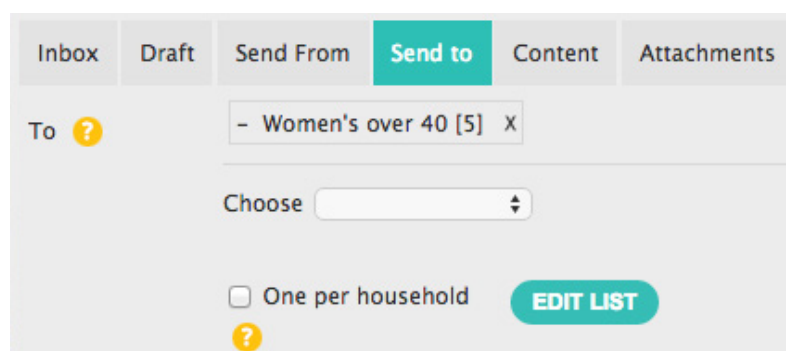
You can now Edit or preview the list.

## Sending an email from the Groups page

From the Groups page you can easily send an email to everyone in the group by clicking on Contact Group



You will then be taken to the contact page. By clicking on the send to tab, you will see that the group has been loaded.



The number shows how many people are in the group. By clicking on the X you will delete this group from being sent an email.

You can still add groups or individual as in level 1 training: sending an email.

Edit list. Now carry on and create your content.

## Email History

Each email that is sent and received is recorded in each persons profile and can be seen through the history tab and in an individuals profile page.

### Content history tab

This tab is found in the navigation bar across the top in the Content page.



Simply click on History to view all sent items that you have sent.

View the date and time an email was sent, The subject, who the email was sent to and who has visibility of this email.

Inbox	Draft	Send From	Send to	Content	Attachments	Signature	Send	History
Date	Subject		Sent to		Visible to		Stats	
17 Sep 2014 12:52	Library item reservation request				me		Show	
9 Sep 2014 17:58	My first email		Mr Kent Albert, Miranda Hart, Newcomers Lunch (each individual in group), Alpha Course Team (each individual in group), Seniors in the Word (each individual in group)		me		Show	
14 Aug 2014 14:13	Library item reservation request				me		Show	

Click on an email to see more details.

By clicking on the attachment it will download to your desktop and you can see the content.

9 Sep 2014 17:58 My first email

Mr Kent Albert, Miranda Hart, Newcomers Lunch (each individual in group), Alpha Course Team (each individual in group), Seniors in the Word (each individual in group)

me Show

mail InFoodle Community Management.pdf

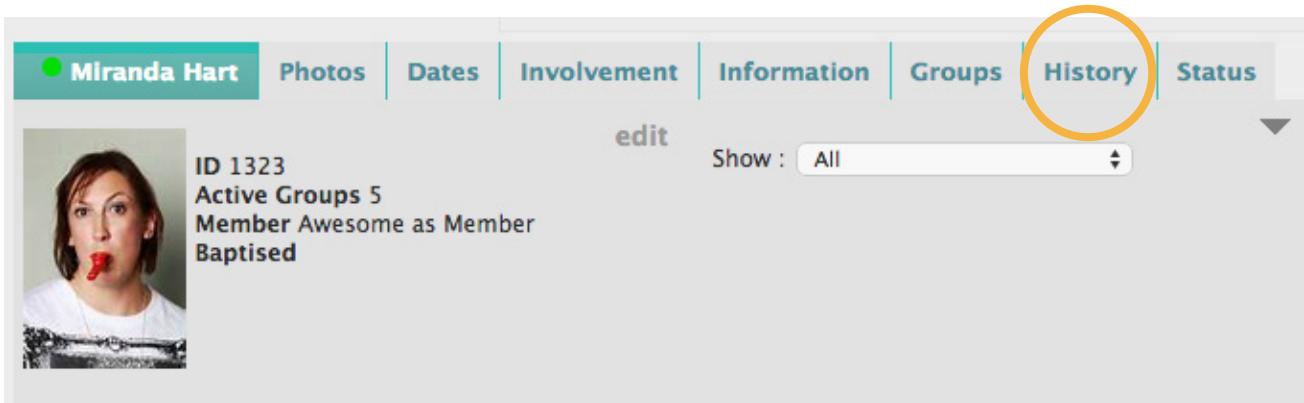
Queued	Sent to	Status	Error Text	Queued	Sent to	Status	Error Text
17:58	Kent Albert	Queued		17:58	Sarah Archer	Queued	
17:58	Lindsay Armstrong	Queued		17:58	Julie Aylwin	Queued	
17:58	Sue Baker	Queued		17:58	Winnie Bear	Queued	
17:58	Jane Bloggs	Queued		17:58	Fred Brown	Queued	
17:58	Mummy Child	Queued		17:58	George Clooney	Queued	
17:58	Doris Dagg	Queued		17:58	Peter Fisher	Queued	
17:58	Freddie Frog	Queued		17:58	Miranda Hart	Queued	
17:58	Matthew Henry	Queued		17:58	Phil Hurn	Queued	
17:58	Gordon Lightfoot	Queued		17:58	Jon Smith	Queued	
17:58	Rob Smith	Queued		17:58	Robert Smith	Queued	
17:58	Ron Smith	Queued		17:58	Sarah Smith	Queued	

### Sent email content

By clicking on an email in the history tab, as above and then clicking on a name, the sent email will then open for you to view. If you click on the **reuse** button this will take you to the content pages. By clicking on content you can make some edits or you can go straight to send.

## History in individuals profile

When on an individuals profile page you will also see their History tab



By clicking on this tab you will see the history of all emails that have been sent through inFoodle to this person (depending on the permissions given at the time of the email being sent) and all emails they have sent in reply.

As demonstrated you can click on them to view the content. But you cannot resend from this page.

## Inserting an image

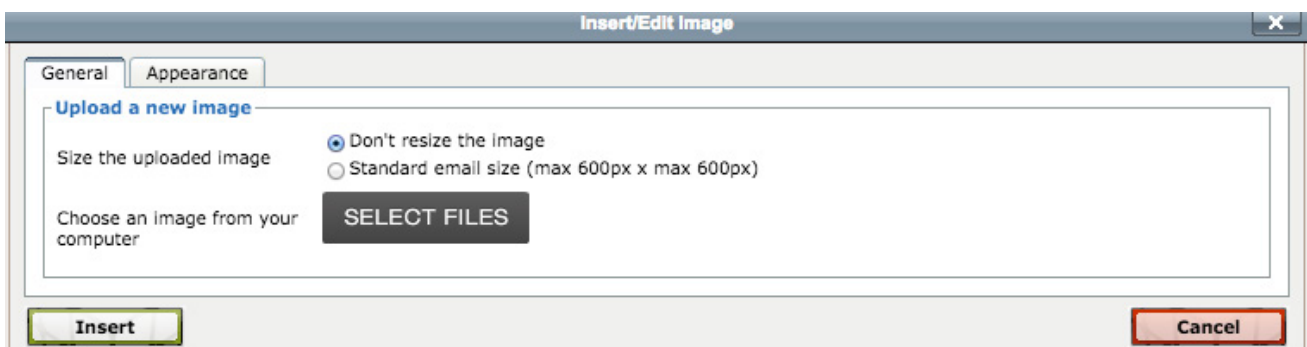
From the content page it is best to first type in all the content that you want and then insert images.

Click on the Image tool, found in the bottom left of the tool selection bar.



## Selecting an image

Click on **select files** and choose an image from your computer. You do not need to resize it here you can do that later. However its best that the image is the correct size before you load it.



The image will now appear below the **select files** button. If you want to change the image click cancel. If you are happy with the image click **insert**.

The image will appear in your email at the place the cursor was before you clicked on the image icon.

## Editing an image

By clicking on the image you can now resize it by grabbing the little white boxes.

Also by using the alignment tools you can put it where you want it to go then edit the text

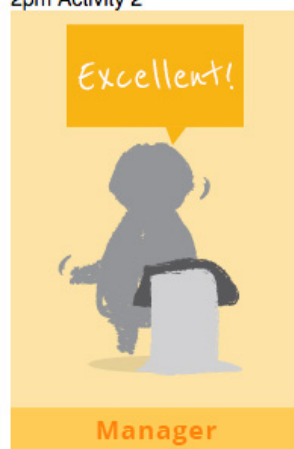
It is best to align to the right side of the page as recipients email settings may be different to yours and the email will then not look the same as you have it now.

Alternatively you can use tables and insert text in one cell and an image in another cell.

Dear {first\_name},

This is our weekly news letter. Saved as a template so you can easily send it out next week with small changes.

**Monday**  
9am Activity 1  
2pm Activity 2



**Thursday**  
9.30am Activity 3  
7pm Activity 4

Thanks - see you there.

Admin.

Dear {first\_name},

This is our weekly news letter. Saved as a template so you can easily send it out next week with small changes.

**Monday**  
9am Activity 1  
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**Thursday**  
9.30am Activity 3  
7pm Activity 4

Thanks - see you there.

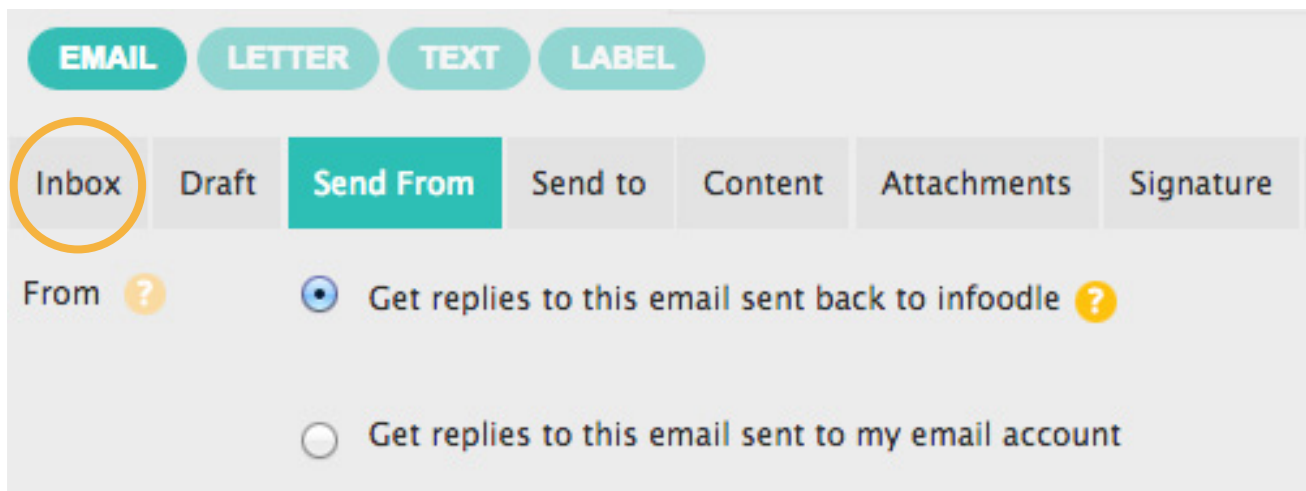
Admin.



## Receiving emails

If you do not have an infoodle inbox the replies will go directly to your normal email. ie. outlook.

If you would like to receive email replays into your infoodle inbox you will need to ask your infoodle administrator to set this up for you.



If you have an infoodle inbox it will be visible on the far left of your contact navigation bar.

Get replies to this email sent back to infoodle, to receive email replies into the infoodle inbox, these will then be visible in a persons history.

You will also receive a copy of any email replies to your normal email inbox. As this example.

You will not be able to reply by clicking on this email, you will need to log in to infoodle and reply as shown later below.

### infoodle

To: Aukje Smith  
infoodle inbox : Re: 15 minute reminder to [join.me](#)

You have received an email into your infoodle inbox

From: @gmail.com  
To: [aukje\\_smith\\_73774449@infoodle.com](mailto:aukje_smith_73774449@infoodle.com)

Subject: Re: 15 minute reminder to [join.me](#)

**Dont reply to this email!**

ok sounds good.



The top right of your screen will show you have an inbox.

When an email comes in it will highlight and show the number of unread emails in your inbox.

You can access your inbox from either location by clicking on the button.



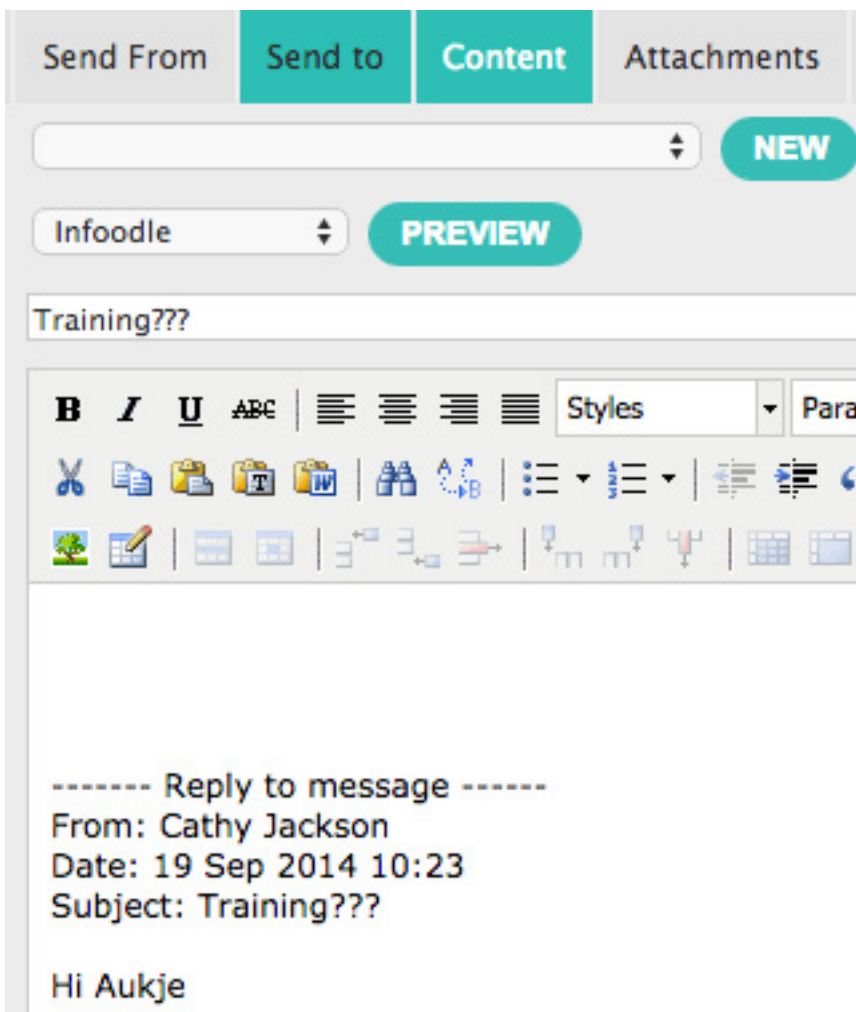
### Replying to an email

By clicking on reply you you will be taken to content screen with the email below.

Simply type your reply and send.

### Forwarding an email

Click on **send** to and change who you want to forward this email to.



**Congratulations you have now completed**

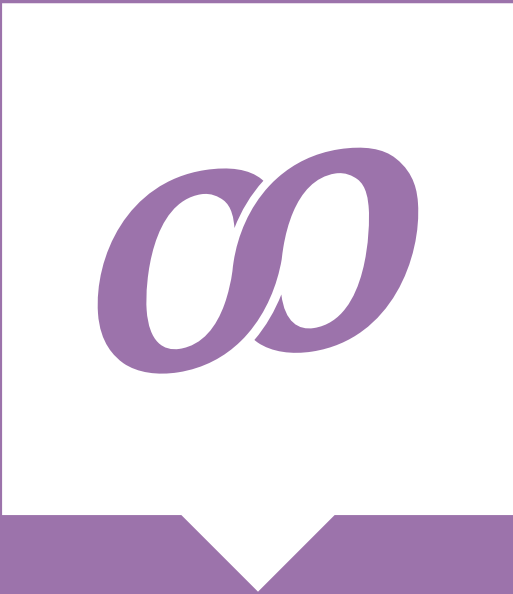
*infoodle contact training* Level 2 - Sending Emails

Contact Training Level 3 covers Text, Letters & Lables

### **Why do we use Infoodle?**

Infoodle is a tool that not only has cool features but is used to equip you and your organisation to do the job you are required to do. That is to care, include and encourage everyone in your community.

In the church setting this means, infoodle is a tool to help equip the saints to fulfil their ministry and to build up the church. Ephesians 4:12



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# Certificate of Completion

has successfully completed

**infoodle contact training**  
**level 2**