CONTACT TRAINING

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SENDING EMAILS
TRAINERS MANUAL

1
LEVEL

STORE   **MANAGE**   **CONNECT**   **TRACK**

Trainer Notes

Before the training session starts make sure that each attender (trainee) has been set a role that allows them access to contacts (done by the Infoodle administrator) and has a login.

Think about how you will conduct the training session:

- Where will you carry out the training session?
- Will you demonstrate using a projector/overhead screen?
- Will each student work from their own laptop or sit at a desktop computer?
- Does everyone have access to the internet/WiFi?
- Will you need a microphone?
- How many people do you think you can train at one time?
- Make sure you have enough trainee hand-outs printed.
- What do you want them to learn?
- Ensure each person has been given permission in their Role to do what you want to train them on. (This will be set by the Infoodle administrator).

This manual covers the following topics:

- Send and email to individuals and groups
- Send emails via the groups page
- Send emails with attachments
- Create own signature

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

INFOODLE CONTACT TRAINING

1

Infoodle Contact

Contact is the name given to the page that is used in order to make contact through infoodle with people.

From the contact page you can send and receive emails, texts, letters and print labels.

The contact page is found by clicking on the contact tab near the top of your screen above the search bar.


Depending on the package you have and what permissions have been set in your role, will determine what you can see in this page.

In this example, Email, Text and Letters and labels have been made available. Email and text are part of Starter, Letters and Labels are an add on module.

Sending texts, letters and labels will be covered by Contact Training level 3.

Level 2 Will demonstrate how to Receive emails, Replies, Find email history, Select filtered groups for emailing and insert images.

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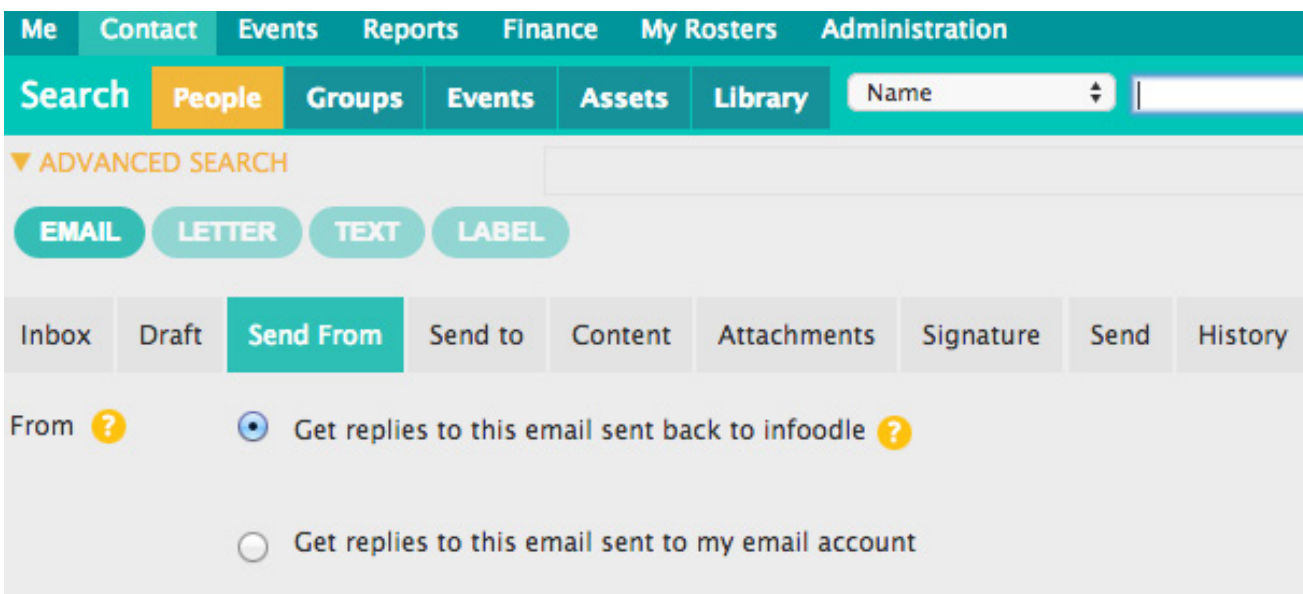
Sending an email from the contact pages

The contact default setting will take you to the email page.

1. Send From

This first page shows who the email is sent from. If you have an infoodle inbox (details how to get this in level 2 training) you can choose to have replies go to your infoodle inbox or to your normal email inbox ie. google, outlook etc. Also your inbox reply account number may be visible if you have this setting.

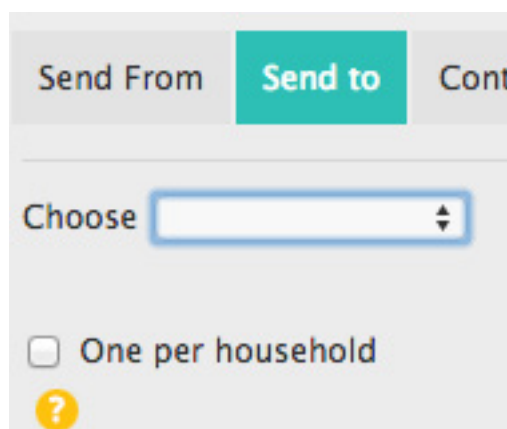The example on the previous page will go to an infoodle inbox.

If you do not have an infoodle inbox you will only see **get replies to this email sent to my email account** on your screen.

2. Send to

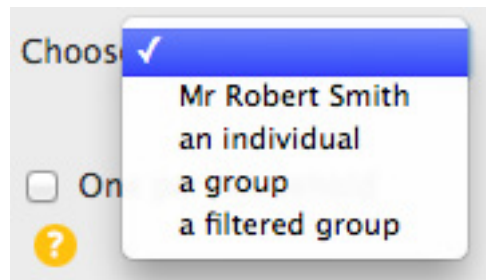Click on **send to.**
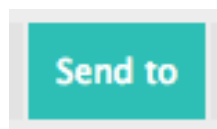
Choose individuals an/or groups.

Click on the up/down arrows and choose **an individual or groups.**

The name at the top of the drop down is the last person viewed by you.

You can make more than 1 selection. You can select an individual, or individuals and 1 or more groups. See example below.
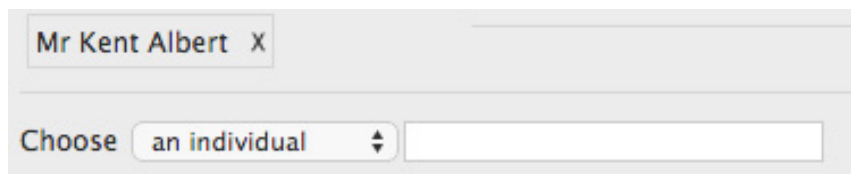
Simply move your cursor to the text box and start typing the individual's name, who you want to send an email to.
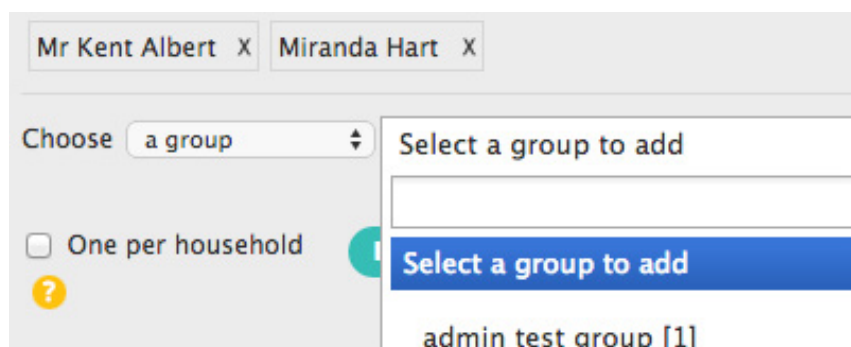 A drop down of possibles will appear. Click on the person you want.
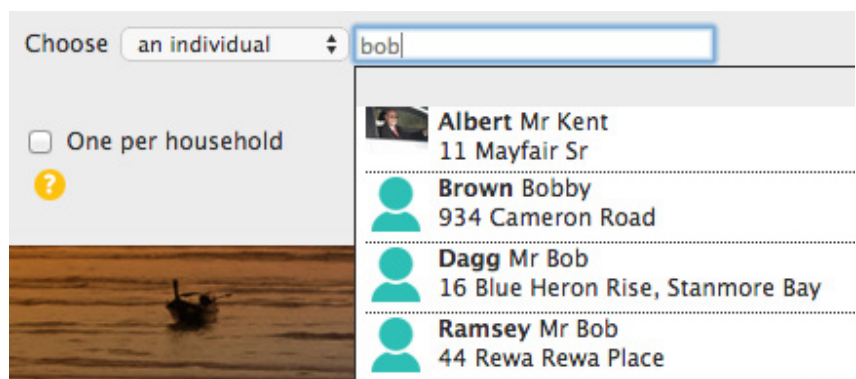
His /her name will appear in the box above. If you want to add more simply choose again.

To add a group to the list choose a group.

Continue to add all the individuals and groups you cant to email. If you decide you don't want that person or group simply click on the X beside and they will be removed from the list.

Mr Kent Albert X	Miranda Hart X	– Newcomers Lunch [38] X	Alpha Course Team [10] X
Seniors in the Word [13] X			

Choose | a group ⇕ | Seniors in the Word [13] ▼

If there is more than one person in a household that could be receiving this email you can choose, by ticking the box, to have only one email go out to that household.

☐ One per household   **EDIT LIST**
❓

If you want to check the individuals that are selected click on Edit List.
A list will appear of all who will receive this email. By default the system will take out those with no email address and any double up email addresses.

Send to list

List of people you have selected

|	Exclude	Full Name	Full address	Email	Cell
1	☑	Mrs Janet AAA	7 Greays Road Manurewa Auckland 2105	janet.AAA@hotmail.com	022 111 444
	☑	Mr John AAA	7 Greays Road Manurewa Auckland 2105		000 222 333
2	☐	Mr Kent Albert	11 Mayfair Sr Bayfair Mt Maunganui 3001	mailmae@xtra.co.nz	0211224010
	☐	David Archer	10 Allen St Morrinsville 3300		
3	☐	Mrs Sarah Archer	20 Allen St Morrinsville 3300	archerfam@gmail.com	0274 568 9786
	☐	Mrs Deborah Armstrong	11 Malcolm ave Christchurch 8022		
	☐	Miss Jess Armstrong	11 Malcolm ave Christchurch 8022		
4	☐	Mr Linsay Armstrong	11 Malcolm ave Christchurch 8022	admin@cnl.org.nz	1234567
	☐	Mr Neil Armstrong	1 The High Street Tauranga		
5	☐	Mrs Julie Aylwin	42 Strathmore Dr RD2 Katikati 3178	mailme@email.com	
6	☐	Ms Sue Baker	34 Anne Road Bellview Tauranga 3001	mailme@xtra.co.nz	0211224010

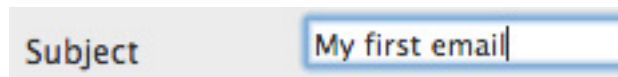You can deselect someone by ticking the box on the left.

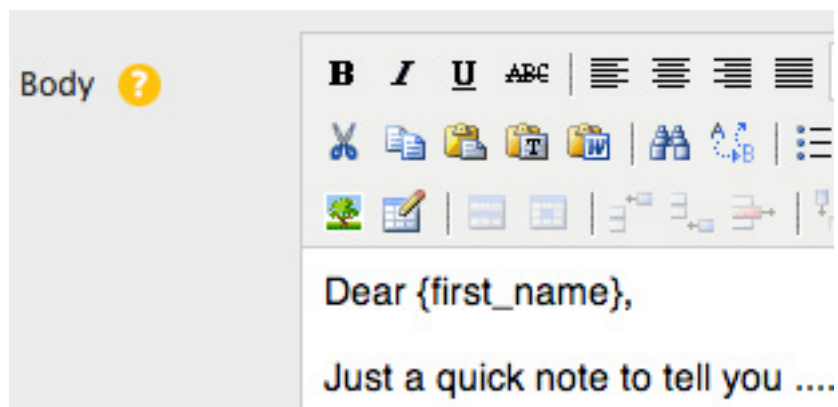When you are happy with the list click on **close**, bottom right of page.

Close

3. Content

Click on the **content** tab. This will take you to the page where you create the email that will be sent.

Content Attachments

NEW DELETE
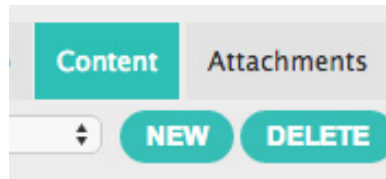
Like most other emails, type in the **subject** of your email.

Subject   My first email

Now you can fill in the body of the email.

Body ?

B *I* <u>U</u> ABC

Dear {first_name},

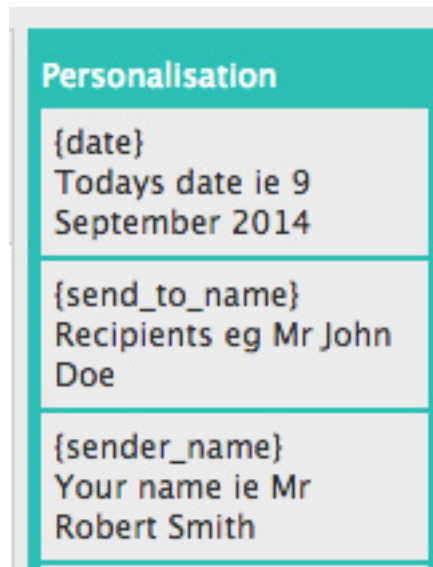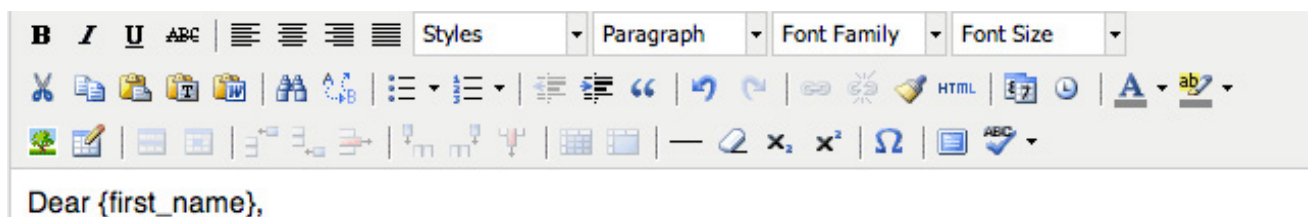Just a quick note to tell you ....

There are several personalisations available.

This means that you can send out bulk emails with each email made personal with name, address etc.

Simply click to select which personalisations you want to choose.

Personalisation

{date}
Todays date ie 9 September 2014

{send_to_name}
Recipients eg Mr John Doe

{sender_name}
Your name ie Mr Robert Smith

Like with most other emails you can select different fonts, colours, images, editing etc using the tools at the top of the body section.
Continue to type in the content of your email.

B *I* <u>U</u> ABC Styles Paragraph Font Family Font Size

Dear {first_name},

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4. Attachments

If you would like to add an attachment, simply click on the attachments tab.

Then click on **select files.** An attachment should not be more than 3mb.

Inbox	Draft	Send From	Send to	Content	**Attachments**

STORED ATTACHMENTS

Attachments (3mb)   **SELECT FILES**
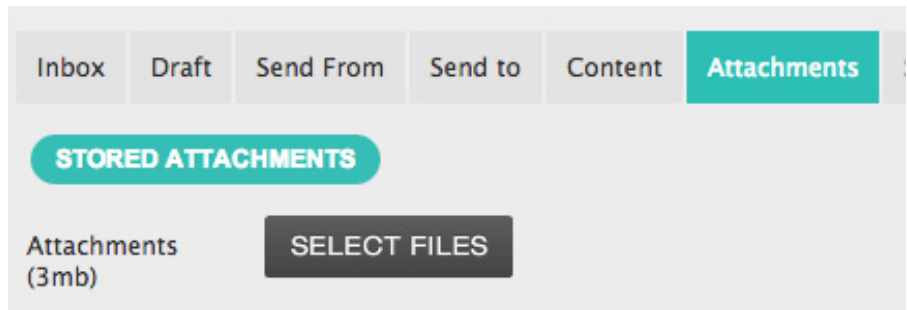
Select your file in the normal way. The document will then appear below.

STORED ATTACHMENTS

Attachments (3mb)   **SELECT FILES**
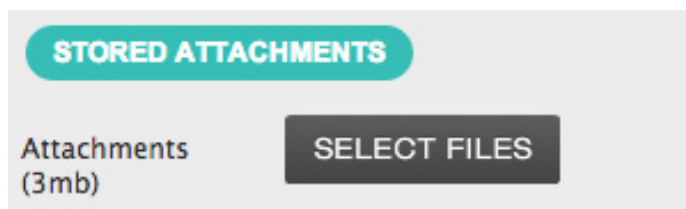
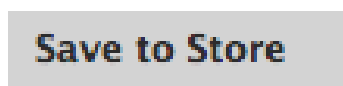**Stored attachements**
If you have a file that you send regularly you can save it as infoodle stored attachments.

STORED ATTACHMENTS

Click on **save to store** and it will be there for next time.

Save to Store

When you wish to use a stored file click on **stored attachments** then click on **choose**.
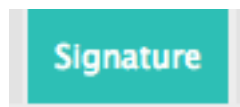
Choose	email Infoodle Community Management.pdf	9 Sep 2014 18:11	Remove
Choose	aukje.jpg	27 Aug 2014 14:46	Remove

If you no longer use it you can remove it from the store.

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5. Signature

You can create your own
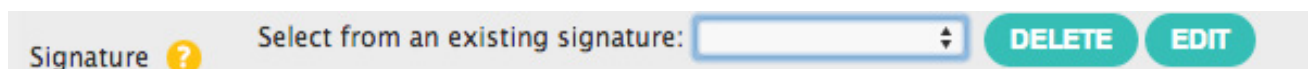footer or signature.
Click on **signature.**

To create the footer you want, first click on **edit.**

If a template has already been created, click on the up/down arrows and select the signature you wish to use.

Crate your new signature. You can use the tools available above.
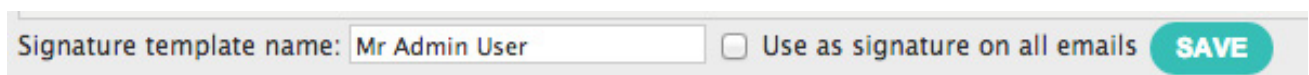
Once you have created your signature, type in the template name and save.

If you want to change your footer at any time just click on edit.
Don't forget to save the changes you make.

If you have more than one signature, you may want to select one as a default. Simply tick the box when saving.
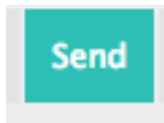
If no signature is selected as default you will need to select one with each email being sent.

6. Send

Now that you have selected who the email is going to, the content of the email, the signature on the email, you can send it.

Select **send.**

Send

Now you need to choose who will have visibility in infoodle of the email that has gone out. This email will be recorded against each person that it is sent to.

Each person has a history tab on their profile page and you can control who is able to see this email in the history tab of each recipients profile page.

Who has visibility?

Please select who you want to be able to see this email

○ Just me
○ Group
○ Anyone

Select a group to add ▼

Just Me - Just me
Group - All full members or administrators of the group you select will be able to see this by clicking in the box and selecting the group.
Anyone - Anyone but only those who have been given permission in their roles to see content.

Next you will see the list you choose in step 1.

List of people in the Send to list

Mr Kent Albert X | Miranda Hart X | – Newcomers Lunch [38] X

Then you will see a detailed list of the individuals.
It will show the line through those you deselected in step 1.

List of people you have selected

1	☑	Mrs Janet AAA	7 Greays Road Manurewa Auckland 2105	janet.AAA@hotmail.com	022 111 444
	☑	Mr John AAA	7 Greays Road Manurewa Auckland 2105		000 222 333
2	☐	Mr Kent Albert	11 Mayfair Sr Bayfair Mt Maunganui 3001	mailmae@xtra.co.nz	0211224010
	☐	David Archer	10 Allen St Morrinsville 3300		
3	☐	Mrs Sarah Archer	20 Allen St Morrinsville 3300	archerfam@gmail.com	0274 568 9786

As mentioned earlier the default setting will not try to send to an empty email address and will not send to duplicate email addresses.

☐	Mr Yogy Bear	19 Cyber St Riccarton Christchurch 2587		
☐	Mr Craig Bird	999 Dee Street City Katikati 3001	mailme@xtra.co.nz	0211224010
☐	Mrs Jane Bloggs	2–30 Woodcocks Road Warkworth 0910 Warkworth 0910	jane@bloggs.om	
☐	Mr Joe Bloggs	2–30 Woodcocks Road Warkworth 0910 Warkworth 0910		
☐	Mrs Wendy Booth	30 Church Street Gate Pa Tauranga 3112	Mailme@xtra.co.nz	0211224010

Also by ticking any of the little boxes you can deselect someone from the list.

Total number of unique contacts 23

☑ Don't send to empty email addresses
☑ Remove all duplicate email addresses

Now you can send. If you wish you can first send a test to your self. Otherwise click on **all.**

Send yourself a test email
TEST

Send emails to all recipients
ALL

You will now see to the right that the number of emails you are sending is placed in the queue and will be sent shortly (as this example is from a demo site, they remain in the queue.) When your email is sent the number will change to 0. You can now either send a new email or carry on with your work.

Total emails placed in the queue = 22

Total emails in the queue = 423 of which 423 are mine

Infoodle will send your emails shortly – you can carry on with your work.

When you are on your home page you may have your widget visible that shows the number of emails in queue, total sent in last week etc.

⚠ Queues

| Queue activity in past 7 days	Yours	Failed	Sent	Total in queue
Email	0	0	43	0
Text	0	0	0	0

Sending an email from an individuals profile page

From an individuals profile page you can click on their email address and this then takes you directly to the Contact pages.

Email

miranda@hart.co.uk ●

Other

Remember that you can only send an email to an individual if the email address has been set as Preferred. You will know this is set because a line appears under the email address.

To set this you need to be able to edit people's details.

office@rotoruabaptist.org.nz Pref? ✓
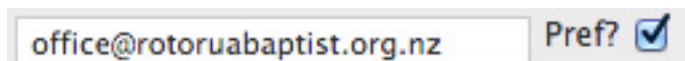
Follow directions starting at 2. Content to continue with sending this email.

Congratulations you have now completed

infoodle contact training **Level 1 - Sending Emails**

Further training is available in the help system including

Level 2 Training will demonstrate how to receive emails,
Find email history, Select filtered groups for emailing and insert
images.

Sending texts, letters and labels will be covered in
Contact Training level 3.

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Contact Level 1V1.1

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