

CONTACT TRAINING

infoodle
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*SENDING TEXTS,
LETTERS & LABELS*
TRAINERS MANUAL

3
LEVEL

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Trainer Notes

Before the training session starts make sure that each attender (trainee) has been given a login, and has a role that allows them access to contacts and what you are wanting to train them in. i.e, email, texts and labels . If you are wanting to train on texts you may wish to ensure they have a text budget. These is usually set by the infoodle administrator.

Ideally the attender of this session should have completed Contacts Training level 1 and level 2, Sending emails. At least the minimum Level 1.

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?
(We reccomend each trainee can work on a computer rather than just watching.)
- 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?
- If you want them to be able to make changes (edit), ensure this has been set in their role. In other words make sure they have the permissions to do what you are wanting to teach them.

This manual covers the following topics:

- Send and texts to individuals and groups.
- Produce letters for individuals and groups.
- Produce labels for individuals and groups.
- Create letter templates.
- Find history of texts and letters sent.

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



Sending Texts

All texts sent through infoodle will cost 15cents per text. Infoodle will send an invoice to your office at the beginning of each month for the total number of texts sent the previous month.

Before you can send any texts you need to be allocated a budget. If you do not have one please go to your supervisor or your infoodle administrator. *For further instructions see administrators handbook.*

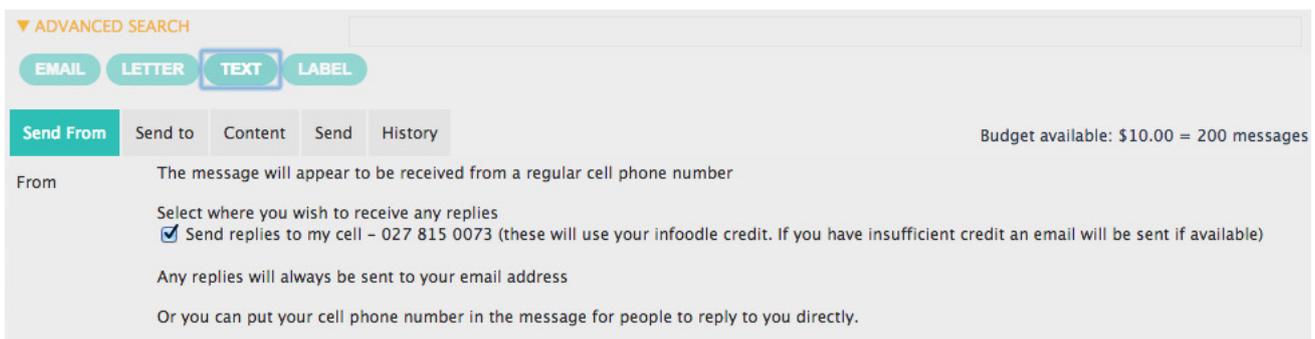
Start at the **contact** tab found on the top navigation bar. Clicking on this takes you to the contact pages.



The default is set to email, so click on **text**.



Send from



In this example you can see that there has been a budget of \$10.00 set which amounts to 200 texts. As texts are sent this will change accordingly.

The text message sent will appear to be received from a regular cell phone number. This is a random infoodle number.

Receiving replies

All replies will be received as a normal email (outlook or google etc.) It will not cost you to receive replies as emails.

You can choose if you wish to receive the replies to your cell phone by ticking the little box. Replies will be charged to your account and taken from your budget.

Alternatively you can add your cell phone number to the text message and ask replies to be sent to that number. Then no charges will be incurred (see example under content.)

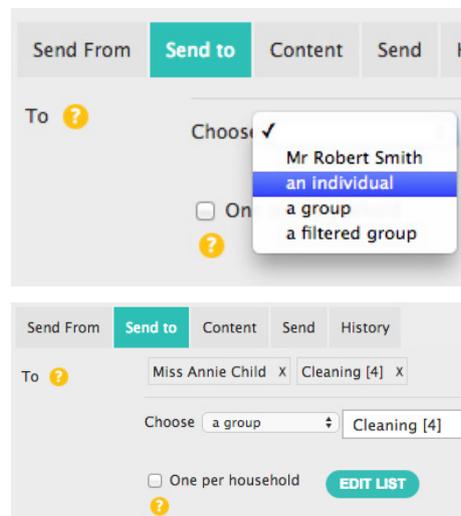
Send to

Similar to sending an email, move across the navigation bar to **send to**.

Choose who you want to send a text to.

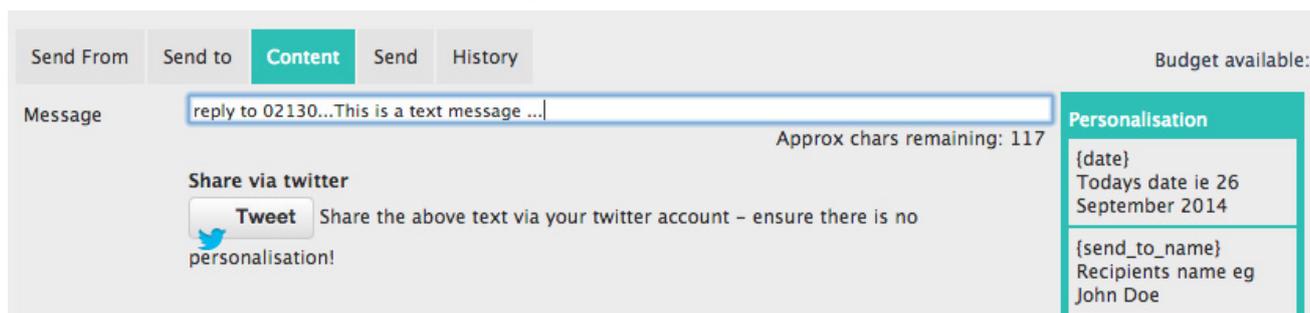
As in sending an email, click on the up/down arrows and select an individuals, and/or groups or filtered groups. *Check previous notes from contact training level 1 and 2 if unsure how to do this.*

The name at the top of the list is the last person you looked at on their profile page.



Content

Click on the content button in the navigation bar.



Move your cursor into the message box and type your message. You can only send a message with total 160 characters. The countdown will show you how many remaining you have.

As in emails you are able to select some personalisations. This means when sending to a group everyone will be personalised to the individual receiving the text.

If you have a Twitter account you can also Tweet this message.

Send

When you click send you will be shown all the people who you selected to receive this text. In the same way as with emails you can remove people from getting this text here.

List of people in the Send to list

Miss Annie Child X Cleaning [4] X

List of people you have selected

Exclude	Full Name	Full address	Email	Cell
<input type="checkbox"/>	Mrs Janet AAA	7 Greays Road Manurewa Auckland 2105	janet.AAA@hotmail.com	022 111 444
<input type="checkbox"/>	Mr Linsay Armstrong	11 Malcolm ave Christchurch 8022	admin@cni.org.nz	1234567

The system will not send any text to cell phones that have not had the cell tick box selected in their profile.

It also takes out any double ups, sending only one message to that number.

As with emails you can send yourself a test text. If you are happy to send it now click on send all.

Send yourself a test text TEST Send texts to all recipients ALL

History

As with emails this text will now appear in the contact history tab and in the individuals profile history. *See notes on history in Contact training level 2.*

Produce letters

From the navigation bar select **letter**.

People

Select individuals and/or groups you wish to send this letter to.

This is done in the same way as with emails. *See Contact Training level 1 - Sending emails.*

EMAIL LETTER TEXT LABEL *

People Content Generate History

To ? - New Member invitees [65] X

Choose a group - New Member invitees [65]

One per household ? EDIT LIST

You may wish to tick **one per household** so only one letter will be generated, unless you would like a letter to go to each individual in the family if more than one member of the family is part of the group you have selected.

Content

In the same way as with emails move across the navigation bar and select **content**.

Type in the content of the letter. You can use the personalisations on the right of the page and the editing tools at the top of the page.

The screenshot shows the 'Letter' editor interface. At the top, there's a 'Template' dropdown set to 'General letter' with 'NEW' and 'DELETE' buttons. Below it are 'Header Margin' (55 mm) and 'Page size' (A4 (210 x 297) mm). The main editing area has a rich text toolbar with options for bold, italic, text color, background color, bulleted list, numbered list, link, unlink, insert link, insert image, insert video, insert audio, insert table, insert calendar, insert signature, and insert table of contents. The letter content includes a recipient address (72 Hawkridge Heights, West Moorland, Bethlehem), a date placeholder, a salutation 'Dear {full name},', and a body of text 'Greetings feriew icmv wefm od onkieff neivv eimv dv popeof'. At the bottom, there's a 'Path: p' field and a 'Template name: General letter' field with a 'SAVE' button and a 'System template' checkbox.

Receipts Personalisation

{date}	ie 26 September 2014
{full name}	Mr John Doe
{first_name}	eg John
{last_name}	eg Doe
{address}	eg 15 High Street Hope Town 3110
{intl address}	eg 15 High Street Hope Town 3110 New Zealand

Once you have created your letter you may wish to save this as a **template**. In the same way as with emails, type in the template name and save.

Generate

Moving across the navigation bar, click on **generate**.

A list will appear with the names of all the people selected. If you selected one per household it will combine the names in the list. But will appear in each individuals personal profile history.

Select who has visibility of this letter in the history tabs. *Refer to Contact Training level 1.*

As with emails you can edit this list. If you are happy you can now print.

Print

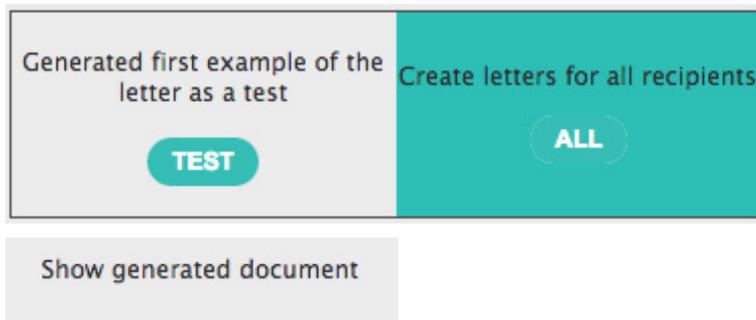
You may wish to print a test copy first. Click on **test**.

You will see to the right of the box **show generated document**.

Click on show generated document.

The letter will then open (or you may need to open) word or pages etc.

If you are happy you can go back to the infoodle page and send this to your printer in the normal way.



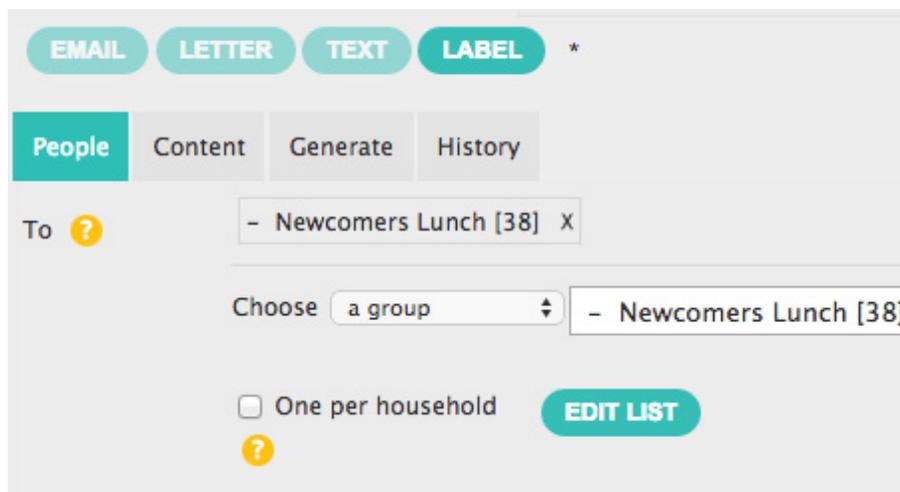
Produce Labels

Before you can produce labels you need to have the label formats set up in the administration area. This needs to be done by your infoodle administrator.

Select **label** from above the navigation bar.

Then select the people you want to print a label for.

See notes from Contact Training level 1 if unsure how to do this.



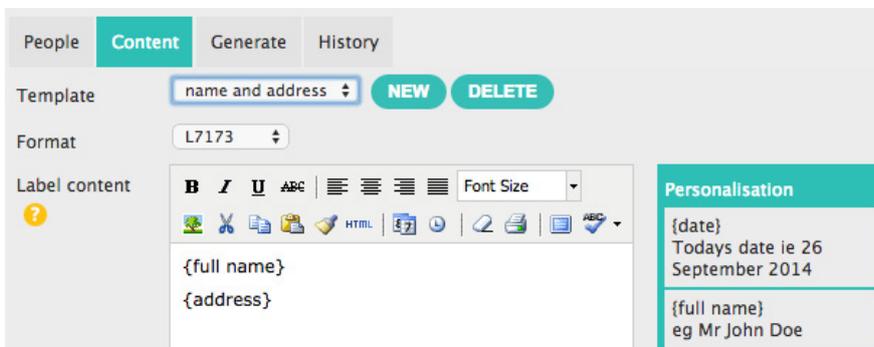
Content

As we were looking at printing letters in the above example for this example we will look at printing address labels.

Click on **content**.

You may have templates set up already, select the one you want.

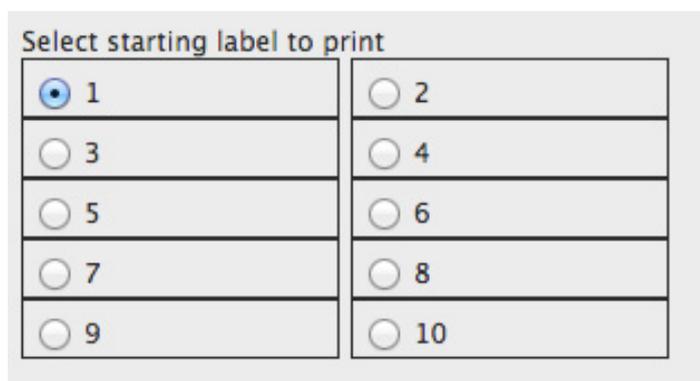
Select the **format** you require. You may need to do a test first to get the right format.



Next start entering the content of the label.

There are personalisations on the right that will help you.

Select where on the label page you want to start printing the labels.



If you are wanting to keep this as a template then enter the template name and save.



Generate

When you click on **generate** a list will appear with all the details of those you have selected. You can deselect people from this list here.

Now you can send yourself a test.

List of people in the Send to list

- Newcomers Lunch [38] X

List of people you have selected

	Exclude	Full Name	Full address	Email	Cell
1	<input type="checkbox"/>	Mrs Janet AAA	7 Greays Road Manurewa Auckland 2105	janet.AAA@hotmail.com	022 111 444
2	<input type="checkbox"/>	Mr John AAA	7 Greays Road Manurewa Auckland 2105		000 222 333
3	<input type="checkbox"/>	Mr Kent Albert	11 Mayfair Sr Bayfair Mt Maunganui 3001	mailmae@xtra.co.nz	0211224010
4	<input type="checkbox"/>	David Archer	10 Allen St Morrinsville 3300		
5	<input type="checkbox"/>	Mrs Sarah Archer	20 Allen St Morrinsville 3300	archerfam@gmail.com	0274 568 9786
6	<input type="checkbox"/>	Mrs Deborah Armstrong	11 Malcolm ave Christchurch 8022		

Click on **test**. Then click on **show generated document**.

Generated first example of the letter as a test

TEST

Create letters for all recipients

ALL

Show generated document

A document will open and show what the labels will look like the example below.

Mrs Janet AAA
7 Greays Road
Manurewa
Auckland 2105

Mr John AAA
7 Greays Road
Manurewa
Auckland 2105

Mr Kent Albert
11 Mayfair Sr
Bayfair
Mt Maunganui 3001

David Archer
10 Allen St
Morrinsville 3300

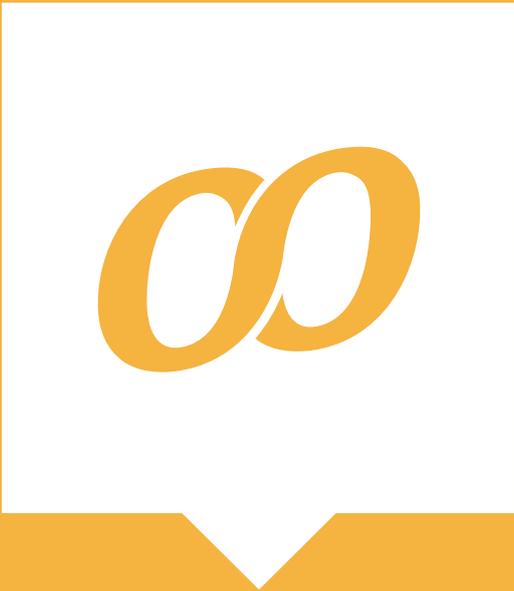
If you are happy with this go back to the infoodle page and click on **create labels for all recipients** then on **show generated documents**.

From here you can send it to your printer in the normal way. Remember to put the labels into your printer.

Congratulations you have now completed

infoodle contact training

Level 3 - Sending Texts, Letters & Labels



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