Mailing

Introduction

The **mailing** centre of **Church**Insight is a tool which will enable you to communicate *effectively* with the members of your organisation using the telephone, post and email.

Many organisations resort to sending flyers to their members by post because it's the "lowest common denominator" – not everyone has email and using the telephone is not always appropriate. The **mailing** centre can radically change this approach (and therefore reduce your costs) as follows:

- Each member updates their own profile in the online address book. This means that you are always sending information to a current address as well as saving hours of admin time keeping your address book up to date.
- Each member can select how they would like to receive information from the church. **Church**Insight automatically selects an appropriate default setting (based on a number of parameters) to ensure that your communications costs are kept to a minimum. Using email where appropriate can drastically reduce postage and photocopying costs and in many cases is more likely to be read than information sent by post.
- The **web office** people records contain "mail history" information – so at any time you can see exactly which emails, post and telephone calls have been sent to an individual.

This quick start guide explains how to create a mailing (including using email templates) and how to recall and use previous mailings.

Accessing the Mailing Centre

➲ If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.

➲ Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.

➲ Click on the **Mailing** link in the top right-hand corner of the window; the mailing centre will be displayed in the work area below.

Creating your mailing stationery

Before you begin sending emails you may wish to create a template with your organisation logo and contact details to give your emails a professional look. To create a new template:

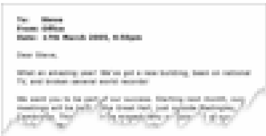
➲ Click the **Edit templates** option in the navigation pane; the work pane will be updated with a list of your current templates.

➲ Click the **Create a new mail template** task link.

- Select one of the following two types of template:

HTML Template

The HTML template allows you to use text formatting (such as fonts and colours), images and columns of information. Most recipients can read HTML format emails, but some older text-based email systems do not support this feature.



Plain Text Template

Messages will be sent as “text only” – with no formatting or images.

All email systems support this format.

- If you are creating a **plain text** template enter text in the space provided.
- If you are creating an **HTML** template use the tools provided to add images, text and tables to your template. For more information on using the editor see **web office quick start guide – documents**.

  The **HTML** email format provides the facility to track the response to mailings by recording which links are clicked as follows:

  - Select a section of text or an image to link.
  - Click on the button on the **image/link** toolbar.
  - Choose a link destination from the range of options available. For more information on these options see **web office quick start guide – documents**.
  - Once you have added the link click the **Click Tracking** button on the **image/link** toolbar. A list of links in your template will be displayed.
  - For each link in your template set the **track clicks** option to **yes** or **no** as appropriate, then click **back to template**.
- Once the template is complete enter a **template name** in the space provided.
- Select an appropriate **available to** group. Any administrator who has the **mail** security permission for the selected group will have access to this template.
- Click the **save** button to store your template. The list of available templates will be updated shortly afterwards.

Creating a mailing

- Click the **Create New Mail** link to begin a new mailing. There are five steps to the mailing wizard as follows:
- **Step 1 – select the group –** check the box next to the groups you would like to send your mailing to. Use the ⊞ and ⊟ buttons if necessary to show or hide any sub-groups.

  You can also select additional options at this stage to restrict who will receive the mailing – send the mailing only to the adults in the group, send the mailing only to the leaders of the group, and filter the group by membership status.

  Once you have selected the appropriate groups click **continue** to move to step 2.
- **Step 2 – select the correspondence method** – the people who will receive this mailing (based on your selection in the previous screen) will be displayed in a list. For each person one of the following three options will be selected:

- **Send email** – send the mailing via email using the email address supplied in **my profile**.
- **Export address label** – send the mailing via post; the mailing wizard will automatically produce an address label (or raw data which can be used in another application) based on the address information supplied in **my profile**.
- **Telephone** – the mailing wizard will produce a list of people to contact along with home, mobile and work phone numbers from the information supplied in **my profile**.

The option selected for each person depends on the **preferred correspondence method** setting they have chosen in the **my profile** area. You can override these settings if necessary or uncheck all the options to remove a person from this mailing.

Click the **continue** button to move to step 3.

- **Step 3 – compose email**

  - Enter a **Subject** for the message in the space provided.
  - If you have any attachments you wish to include click the **Attach Files** button. A new window will open allowing you to locate the files on your hard disk. Once you have finished selecting attachments click the **OK** button to close the window and add the attachments to your message. Attached files must not be greater than 2MB in size.
  - Select from one of the templates available to you using the **template** selector, then compose an email using the editor provided (see **creating a template** above for more information). Alternatively enter text in the space provided to compose a plain-text message.
  - The **mail merge** option allows you to send emails in one of two different ways:
    - When the **mail merge** option is **enabled** each person will receive an email addressed solely to them. If you wish you may also use the **mailmerge** fields to include appropriate information (such as receipient name, sender name and web site address) within the text of the email.
    - When the **mail merge** option is disabled – every recipient of the email will be listed in the "**To**" section of the email; this enables any member of the group to respond to the entire group using "Reply to All".

      Note: this feature will not be available if there are more than 20 people receiving the message by email.

  Click **continue** to send the email to the appropriate people. Once the emails have been sent you will receive confirmation of the number sent successfully and the number which have failed.

  Click **continue** to move onto step 4.

- **Step 4 – export addresses and telephone numbers**

  The list of people to contact via telephone can be displayed as a **web page**, as an **Adobe PDF** document (you will need Adobe Acrobat Reader to display this file), or as a **comma separated file** for use in other applications. Click the appropriate link to display a list of people to contact alongside their home, mobile, and work telephone numbers.

  To export the address labels, first select whether you would like to create one label per family, or one label per person, then download the addresses in one of the following two formats:

- **As an Adobe PDF** – this option provides a ready-to-print document which can be printed directly onto one of the pre-defined Avery label sheets. You will need Adobe Acrobat Reader in order to be able to view this document.
- **As a comma separated file (.csv)** – this option provides the address information in a raw data format for use in other applications (for example the "Mail Merge" facility in Microsoft® Word).

Once you have exported the addresses in the desired format click **continue** to move to step 5.

➲ **Step 5 – save the mailing** – you can keep this mailing for future reference in one of the following two locations:

- **Save this mailing in your personal Sent Items folder** – by storing the mailing in your Sent Items folder only you will be able to display the contents of that mailing and use the message or recipients as a basis for future mailings.
- **Save this mailing in a group's Sent Items folder** – mailings may be stored in the Sent Items folder for any group on which you have the **mailings** permission.

If you wish to retain this mailing for future reference enter a **subject** and **description** to help you identify it in the **mailing** centre at a later date.

Finally, click **next** to return to the **mailing** centre.

Recalling a previous mailing

The **mailing** centre allows you to see the contents of a previous mailing and use it as the basis for a new mailing. Down the left hand side of the mailing centre the **sent items** pane allows you to display the mailings stored in either your personal **my sent items** folder or in one of the group folders. Click one of the folders to update the mail list as illustrated below:

	From	Subject	Email	Mail	Phone	Sent	Clicks
	Church Office	Church Prayer Meeting	240	0	10	29 November 2003 14:13	198
	Church Office	November Prayer Meeting	258	0	10	27 November 2003 16:41	84
	Church Office	This Sunday	319	0	0	12 November 2003 13:15	0

Highlight any message to see a list of recipients and the contents of the message in the area below.

Click Tracking

If you have added links to your email with the **Click Tracking** option enabled you can see how many recipients have responded by selecting the link. Select the **Details** button to display a new window containing statistics for each link as well as an overall response measurement. The **details** option may be used to display a list of members who have selected the link and when.

Re-using a Mailing

Any stored message may be used as the basis for a new mailing using one of the following tasks available at the bottom of the message contents:

➲ **Forward this mail to a new list of people** – send the same message content to a new group of people.

➲ **Send a new mail to this list of people** – send a different message to the same group of people.

Mail History

Mail History allows you to see which mailings have been sent to a particular person. To see the mailing history for a person in your database:

- Display the **group members** view for the group where your member is located.
- Click on the name in the **group members** list to display the appropriate member information window.
- Select the **mail history** tab; any mailing stored in the **sent items** of a group where you have the **mail** permission, as well as any mailing stored in your **my sent items** folder which has been sent to this person will be listed:

	Church Office	November Prayer Meeting	church life
	Ben Smith	The Sunday welcome duty Rota	Welcome Team

Click on any mailing **subject** to update the **mailing** centre window with the contents of the message.

Rotas which have been sent to this person will also be displayed in the list.

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