Mailing

Introduction

The **Mailing** centre is the communications centre of **church**insight allowing you to send 'mailings' directly to different groups within your church using the most effective means.

This quick start guide explains how to use the **mailing** centre to send a mailing and the facilities available for recalling previous mailings.

Creating a mailing

- 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 a new window shortly afterwards.

- Click the **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 two options will be selected:

  o **Send email** – send the mailing via email using the email address supplied in **my profile**.

  o **Export address** – 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**.

  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 remove the person completely using the ✗ button.

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

- **Step 3 – compose email** – enter a message in the box provided. The email can be sent in one of two ways:

  o As personal emails – each person will receive an email addressed solely to them. If you wish you may also use the **mailmerge** fields to include the appropriate name within the text of the email.

o   As a group email – 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 to send.

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

↺   **Step 4 – export addresses –** select whether you would like to create one label per family, or one label per person; choose a label format using the **label size** selector, then download the addresses in one of the following two formats:

o   **As a Adobe PDF** – this option provides a ready-to-print document which can be printed directly onto the appropriate label sheet. You will need Adobe Acrobat Reader in order to be able to view this document.

o   **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:

o   **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.

o   **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. No group is selected by default as a mailing may be sent to an arbitrary selection of people with no reference to a particular group.

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 **save and finish** 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	Sent
✉	Church Office	Church Prayer Meeting	240	0	29 November 2003 14:13
✉	Church Office	November Prayer Meeting	258	0	27 November 2003 16:41
✉	Church Office	This Sunday	319	0	12 November 2003 13:15

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

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:

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.