

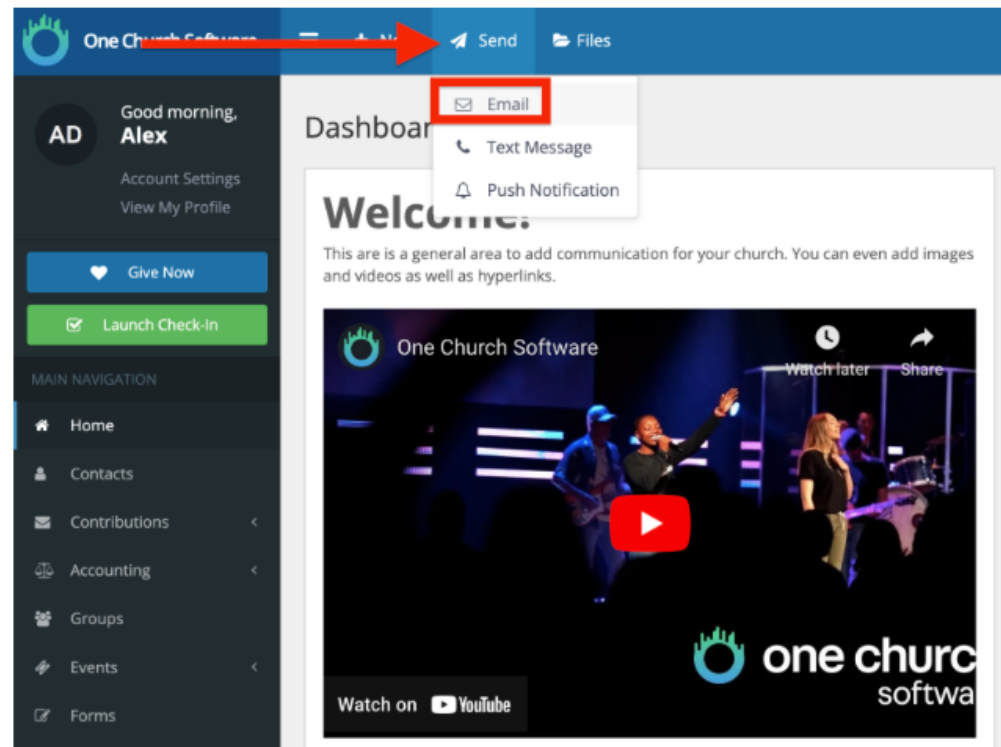
HOW TO SEND EMAILS

Emails can be sent from many places within the software. Any non-guest user can send emails from the system.

From the Top Toolbar

You can send an email to an individual or group from the top toolbar.

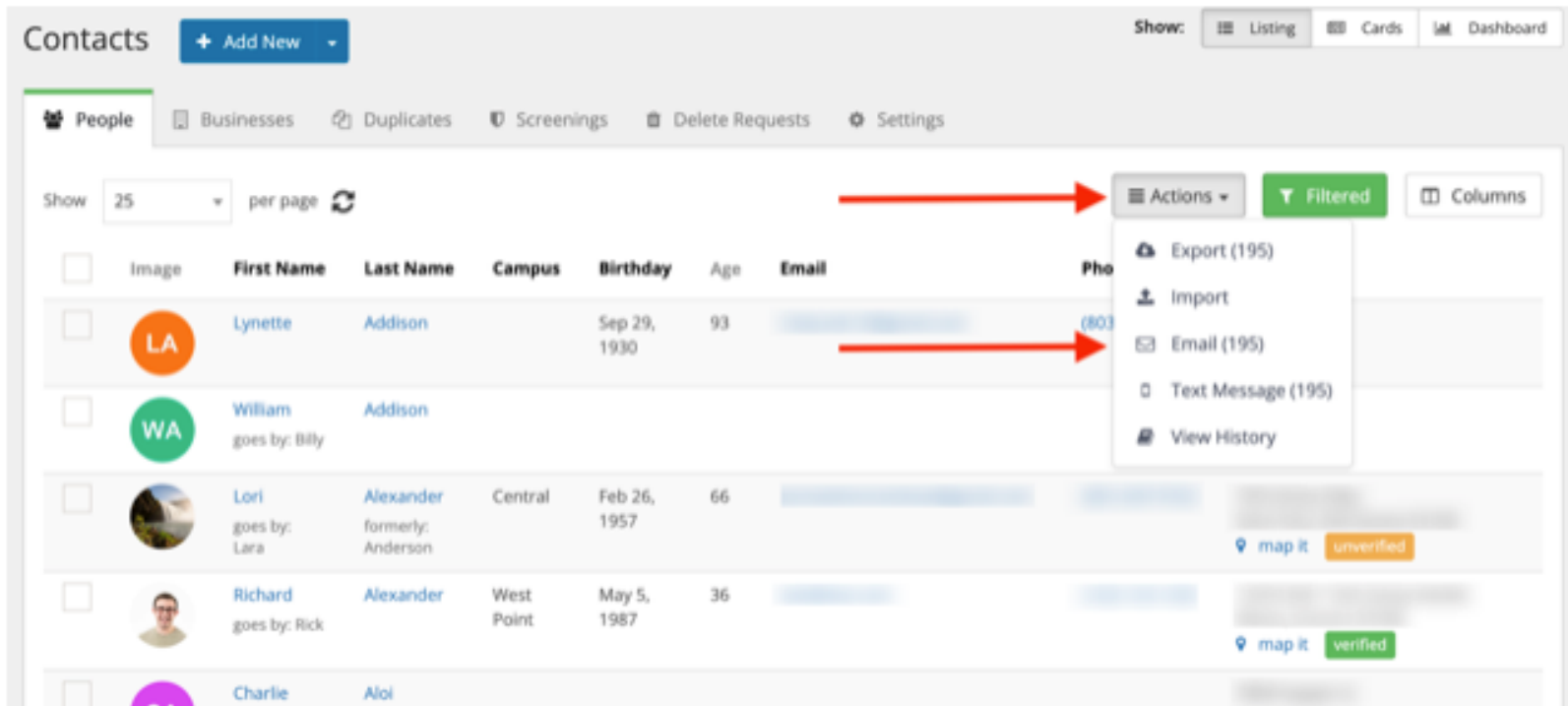
- Select the “SEND” button to make the dropdown appear and choose “EMAIL”



FROM THE PEOPLE MODULE

Select the “ACTIONS” button dropdown menu and select “EMAIL”

Note: You can filter the directory to your desired needs (by age, marital status, campus location, and more). Once you have the list of people filtered to your needs, select the "Actions" dropdown menu and choose "Email."

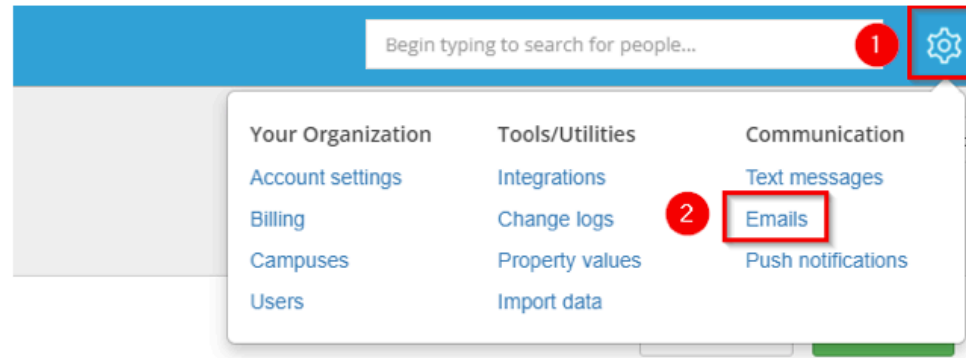


The screenshot displays the 'Contacts' interface. At the top, there is a '+ Add New' button and a 'Show:' menu with options for 'Listing', 'Cards', and 'Dashboard'. Below this, there are tabs for 'People', 'Businesses', 'Duplicates', 'Screenings', 'Delete Requests', and 'Settings'. The main area shows a list of contacts with columns for 'Image', 'First Name', 'Last Name', 'Campus', 'Birthday', 'Age', 'Email', and 'Phone'. A dropdown menu is open over the 'Actions' button, showing options: 'Export (195)', 'Import', 'Email (195)', 'Text Message (195)', and 'View History'. Two red arrows point to the 'Actions' button and the 'Email (195)' option in the dropdown menu.

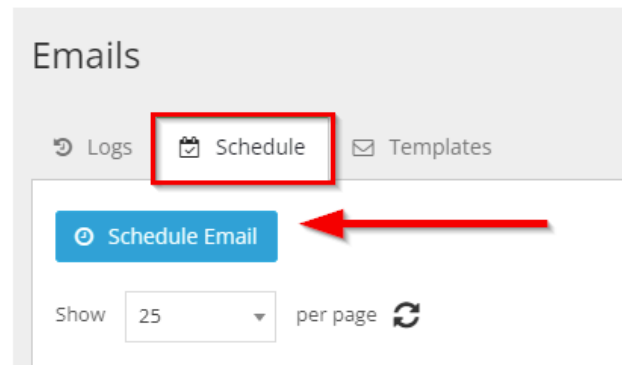
| Image | First Name | Last Name | Campus | Birthday | Age | Email | Phone |
|--------------------------|------------|-----------|------------|--------------|-----|------------|------------------|
| <input type="checkbox"/> | Lynette | Addison | | Sep 29, 1930 | 93 | [Redacted] | (803) [Redacted] |
| <input type="checkbox"/> | William | Addison | | | | | |
| <input type="checkbox"/> | Lori | Alexander | Central | Feb 26, 1957 | 66 | [Redacted] | [Redacted] |
| <input type="checkbox"/> | Richard | Alexander | West Point | May 5, 1987 | 36 | [Redacted] | [Redacted] |
| <input type="checkbox"/> | Charlie | Aloi | | | | | |

From the Communication Module

From the top settings, select the "Gear button" menu, then "Communication" and "Emails."



Next, select the "Schedule" tab and choose "Schedule Email."



From a Group

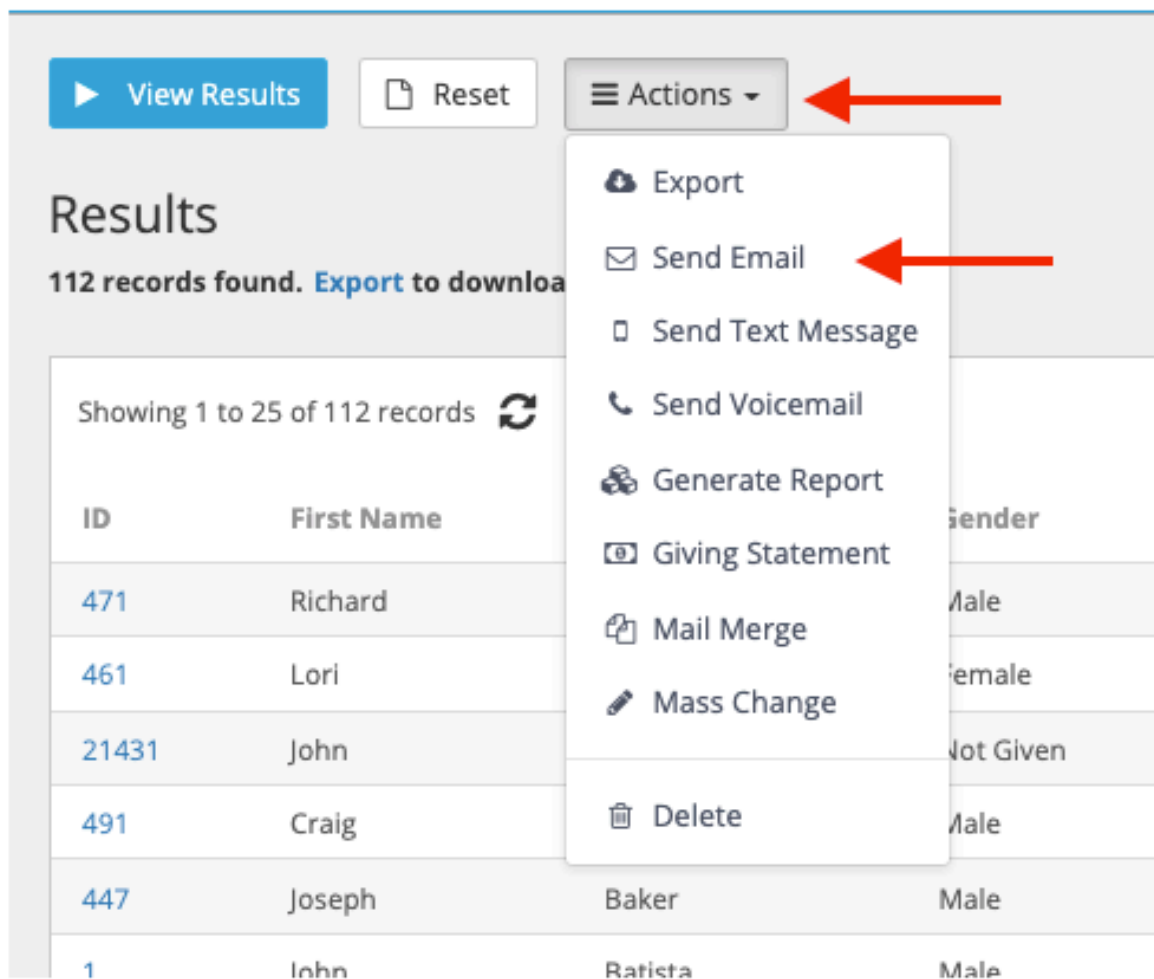
From the left navigation choose "Groups," find the appropriate group, go to the "Members" tab, select the "Actions" button dropdown menu, and select "Email."

The screenshot shows the 'Members' tab of a group named 'Adult - All Ages'. The page includes a navigation bar with tabs for Info, Calendar, Members, Attendance, Positions, Files, Discussions, and Notes. The 'Members' tab is active. Below the navigation bar, there are options for 'Listing' and 'Signups', an 'Add Member' button, and a 'Show: Listing Cards' selector. A table lists members with columns for Image, First Name, Last Name, Email, Phone, Type, and Position. The 'Actions' dropdown menu is open, showing options: Export (64), Email (64), Text Message (64), and Download Check-In Roster (64). Red arrows point to the 'Members' tab and the 'Actions' dropdown menu.

| Image | First Name | Last Name | Email | Phone | Type | Position |
|--------------------------|------------|-----------|---------------------|----------------|-----------------|----------------------------------|
| <input type="checkbox"/> | Albert | Russell | | (361) 987-8793 | Leader admin | |
| <input type="checkbox"/> | Betty | Larson | blarson@walmart.com | (361) 484-1410 | Leader admin | 2 years ago |
| <input type="checkbox"/> | Alan | Vasquez | | (361) 154-3676 | Member | Tue Mar 23, 2021 5 months ago |

From the Query Builder/Reporting Module

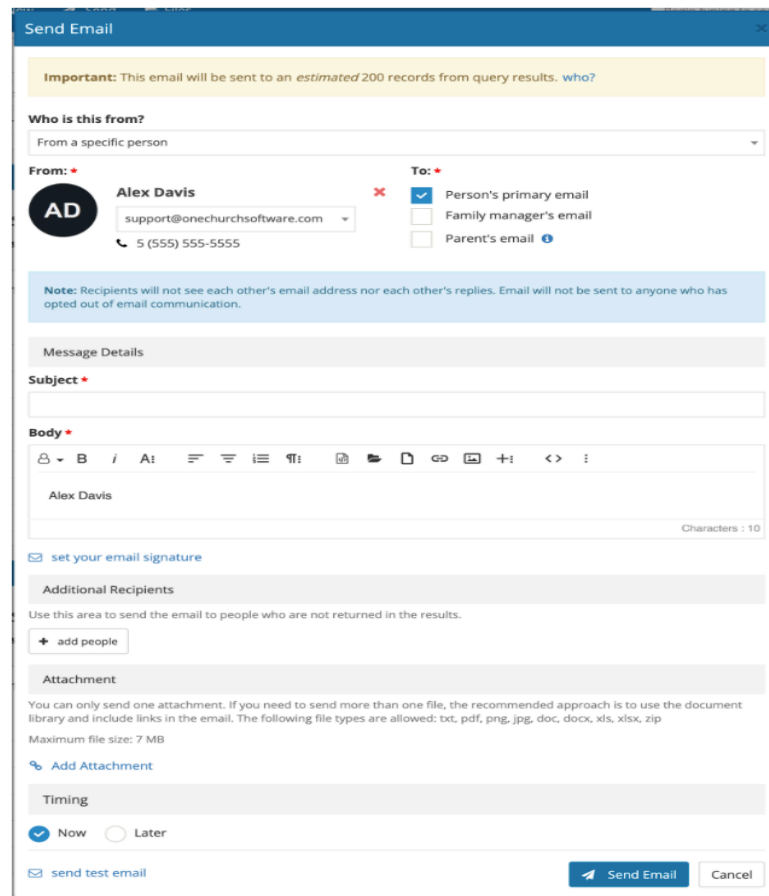
After you run your query in the “Reporting” module, select the “Actions” dropdown menu and select “Email.”



Note: Outgoing emails from a person will now use their nickname, if available, in the From and Reply fields.

PREPARING TO SEND A MASS EMAIL

- A pop up will display, like in the screenshot below, in which you can specify who the email is from, and if the email should be sent to a person's primary email, family manager's email, or parent's email. The user must input a subject and the body of the email.
- Additional recipients can be included in the email, those in which you were not generated by the Query Builder: People. An attachment can also be enclosed in the email.
- The email can be sent to everyone now by choosing the "Send Now" button; you can also select "Later" and schedule the email.



The screenshot shows a 'Send Email' dialog box with the following sections:

- Important:** This email will be sent to an *estimated 200* records from query results. [who?](#)
- Who is this from?** From a specific person (dropdown menu)
- From:** Alex Davis (profile icon AD), support@onechurchsoftware.com, (555) 555-5555
- To:** Person's primary email, Family manager's email, Parent's email
- Note:** Recipients will not see each other's email address nor each other's replies. Email will not be sent to anyone who has opted out of email communication.
- Message Details**
 - Subject:** (empty text field)
 - Body:** Alex Davis (text area with rich text editor toolbar, character count: 10)
- Additional Recipients:** Use this area to send the email to people who are not returned in the results. + add people
- Attachment:** You can only send one attachment. If you need to send more than one file, the recommended approach is to use the document library and include links in the email. The following file types are allowed: txt, pdf, png, jpg, doc, docx, xls, xlsx, zip. Maximum file size: 7 MB. Add Attachment
- Timing:** Now, Later
- Buttons:** send test email, Send Email, Cancel