

Instructions for Emailing from ChurchKeeper

ChurchKeeper has the ability to email directly to your membership. You can send an email with or without an attachment or you can email output such as directories, reports, statements, etc. Statements in particular can be emailed to your membership, and save you postage. ChurchKeeper uses a technology called MAPI (Messaging Application Program Interface) to email. This means you need to have an account in either Microsoft Outlook or Outlook Express. If you check your emails by going to your service provider's website for example: Comcast.net, yahoo.com, gmail.com or use webmail, you probably don't have an outlook or outlook express account. If you do not, and wish for us to set up your emails, please contact us at 800.673.5204.

Step 1) Setup Emails in your Congregation Workbench.

Emails are entered into member/visitor records in the congregation workbench. To enter emails from the main menu of ChurchKeeper, pull down the 'Daily Options' menu, and click on 'Congregation WorkBench'.

Each person's record has an email field in the 'More' tab of the congregation workbench. Locate the person in the 'Information' tab, and then click on the more tab, and click 'Change'.

The screenshot shows the 'Congregation Workbench' interface for 'Samuel Adams Jr.' with the 'More' tab selected. The form is divided into two main sections: 'Phone/In Touch Information' and 'Personal Information'. The 'Phone/In Touch Information' section includes fields for Home (121/388-2333), Work (333/111-2222), and Cell/Fax (222/333-4444) numbers, with radio buttons for 'Cell' and 'Fax'. The 'Personal Information' section includes fields for Nickname (Sammie), Birthdate (12/30/1988), Sex Code (Male), Relation (Son), Job (None Entered), and Marital Status (Married). There is also an 'E-mail' field containing 'samadamsjr@youremail.net'. At the bottom, there are 'Show on Reports/Labels' and 'Active Contributor' sections with radio buttons for 'Yes/No' and 'Active/Inactive', and a 'Statement' section with radio buttons for 'Print' and 'Don't Print'. There are also 'SAVE' and 'Abort' buttons.

Click 'Save', and save this persons email. Repeat this process until you have inputed all email addresses.

Step2) Testing your email capabilities. We suggest you enter one, and then click on the E-mail control. This will test your emails. Make sure you launch your default mail carrier (Outlook and Outlook Express) and check to make sure the email was sent. Settings inside of both programs need to be set to assure that emails are allowed from 3rd party applications. A check box in the security options of your mail carrier options is normally checked by default stating “Warn me if other applications try to send mail as me.” Make sure this box is checked off in your mail carrier.

Step3) Sending a stand-alone email to your membership. Once emails are input, you can at any time, email to member/visitors from the ‘Congregation Workbench’ by simply positioning to their record and then clicking on the E-mail control in the ‘More’ tab.

Info More

Additional Information For: **Samuel**

Phone/In Touch Information

Home **121/388-2333** Ext

Work 333/111-2222

Cell/Fax 222/333-4444 Cell

Additional Information

E-mail

samadamsjr@youremail.net

You will receive the following prompt:

Church E-mailer

Lastname	Firstname	Mid_name	Title	Suffix	Nickname	Head	E-mail
Adams	Samuel	A	Mr.	Jr.	Sammie	<input checked="" type="checkbox"/>	samadamsjr@youremail.net
Adams	Samuel	A	Dr.	Sr.	Sam	<input type="checkbox"/>	samadams@youremail.net
Adams	Sarah	M.	Mrs.			<input checked="" type="checkbox"/>	sarahadams@yourmail.net
Doe	Jane					<input type="checkbox"/>	

Enter search argument and press enter, or select from grid. Click record once desired person is located

E-mail Address: samadamsjr@youremail.net

Subject: Church Email

Text of E-mail

Attachment

Select Attachment

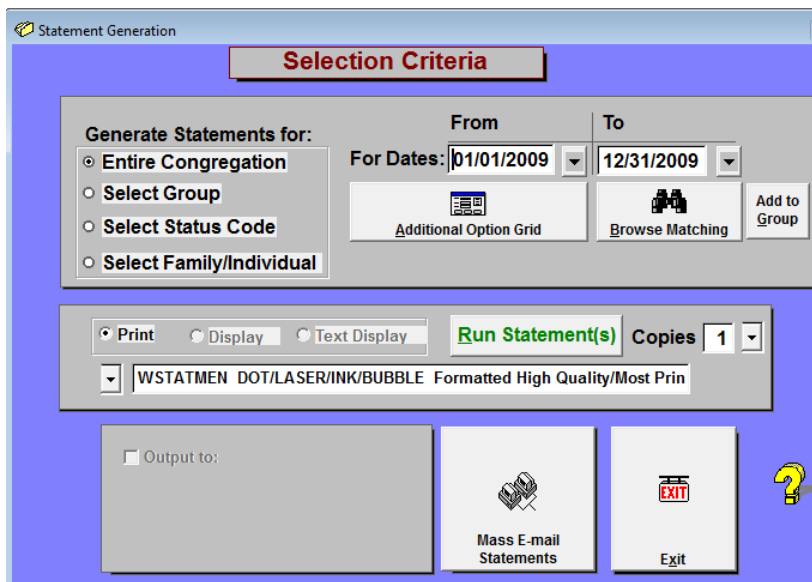
Send Email Cancel

Edit Spell Check

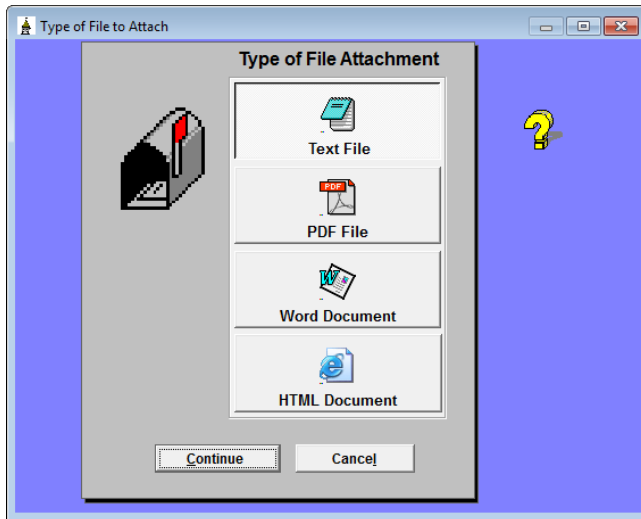
You can select any individual in the ‘Congregation Workbench’. You will be positioned to the person’s record that you started with. Enter the text of the email, and if you wish to add an attachment, click on the select attachment. Once you are ready to send the email, click on the Send Email control at the bottom of the screen. Control will then pass to your mail carrier (Outlook or Outlook Express). Press Send for your carrier and the email will be sent.

Step 4) Emailing statements, reports, etc. Statements can be emailed to your congregation.

To email reports, directories, statements, to your membership, from the ‘Reports’ pull down of the main menu of ChurchKeeper, select the report you wish to email. Once you are at the selection criteria, you will notice an option to ‘Mass E-mail’. Whatever records you selected with the selection criteria will be emailed. We suggest you test an email to yourself first, to make sure you receive the email with the attachment.

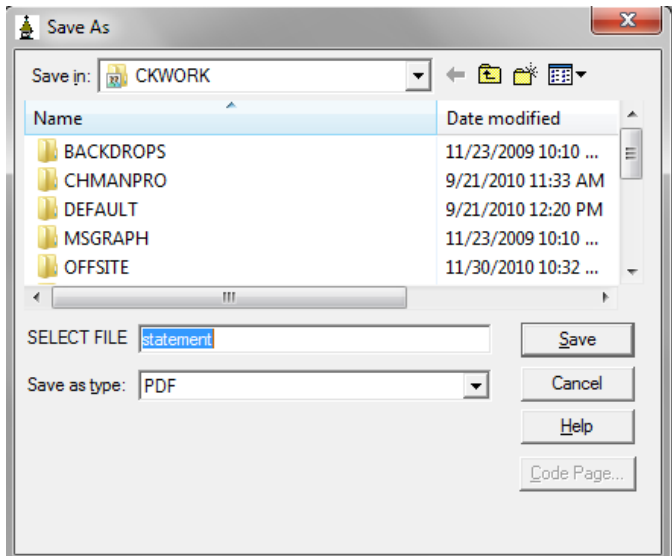


Once you select to 'Mass E-mail', you will receive the following prompt.



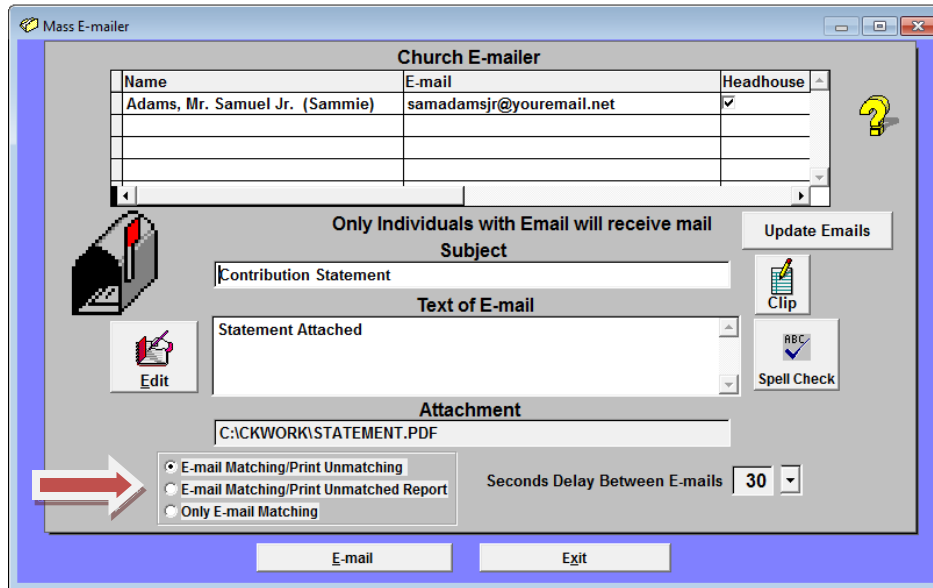
Four options exist for the 'Type of File Attachment'. Text File which is a text file of the attachment which is a low quality generic format. PDF file which is an exact image of the attachment in PDF format (Adobe Reader required, which comes on most computers today). Word Document which is a document compatible with Microsoft Word, or HTML Document, which is html code, and will open up the internet browser when viewed by the recipient. Normally, users select PDF file.

Once you have selected the correct file type, you will be prompted for a location a temporary file will be saved so it can be sent.



We suggest you take the default and press 'Save'.

You will then receive a prompt for the ChurchKeeper 'Mass Emailer'.



An option grid at the bottom lets you specify how to handle membership records with and without email addresses. Option 1, 'E-mail Matching/Print Un-matching' will email those people with email addresses and print statements for those who do not have email addresses. Option 2, 'E-mail Matching/Print Un-matching report' will email statements, and print a report of those who do not have email addresses. Those will then need to be mailed. Option 3, 'Only E-mail Matching' will only email statements to individuals who have email addresses.

If you have problems with the email feature in ChurchKeeper, please call 800.673.5204.