

## How do I do a mass email in FIMS?

### There are two options:

- Profile Report: Address Listing with Labels & Email
- Data Grid Report: Labels & Email option

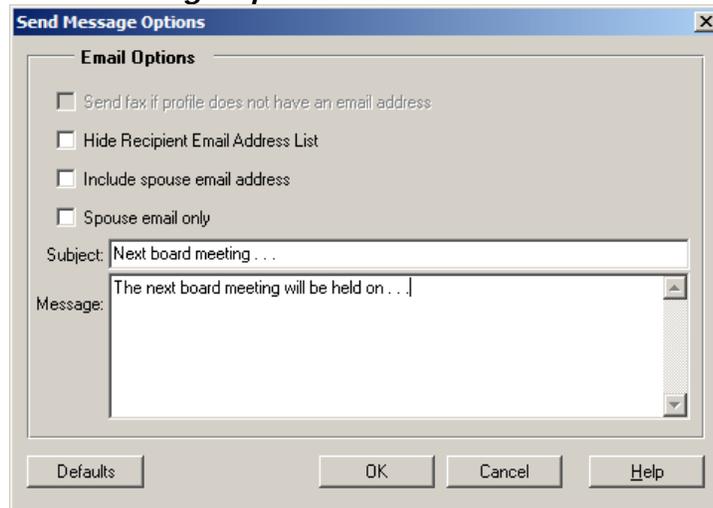
**Note:** If you are a Host\*Net user, see the Mass Emailing in FIMS for Host\*Net Users below.

**Note:** Most Internet service providers enforce a limit on how many emails can be sent in one batch to prevent spamming. If a large mass email is sent and it exceeds their limit, they may automatically delete them. Check with your Internet service provider to find out their limit.

## Profile Report: Address Listing with Labels & Email

1. Run the **Address Listing Report w/Labels & Email**. Select all Profiles you want to send the email to.
2. Sort as desired, and click Run Report.
3. In the FIMS Viewer, select **Send Message / Options**. The **Send Message Options** window opens.

### *Send Message Options Window*



The screenshot shows a dialog box titled "Send Message Options". It features a section labeled "Email Options" with four unchecked checkboxes: "Send fax if profile does not have an email address", "Hide Recipient Email Address List", "Include spouse email address", and "Spouse email only". Below the checkboxes is a "Subject:" text box containing "Next board meeting . . ." and a "Message:" text area containing "The next board meeting will be held on . . .". At the bottom of the dialog are four buttons: "Defaults", "OK", "Cancel", and "Help".

4. Select any of the following options:
  - If you want to hide the list of recipients when you send the e-mail (blind carbon copy), select the **Hide Recipient Email Address List** checkbox.

**Note:** You should select this option if you want to protect the privacy of the e-mail recipients, or if the list of e-mail addresses is very large.
  - If you want to send the e-mail to both the Profile and their spouse, select the **Include Spouse Email Address** checkbox.

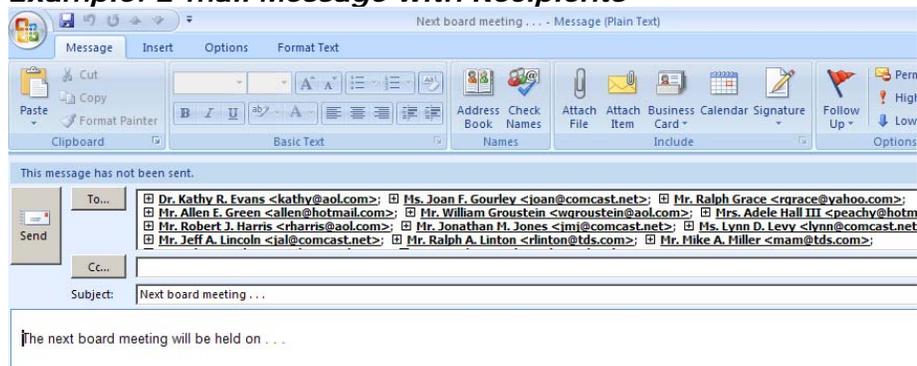
- If you only want to send the e-mail to spouses and not to the main Profile, select the **Spouse Email Only** checkbox.
5. (Optional) In the **Subject** field, enter the subject line for your message.
  6. (Optional) In the **Message** field, enter the body of your message.
  7. (Optional) If this is a message that you send on a regular basis, click the **Defaults** button and save the message settings for future use. See more in the **User Tip** below.
  8. When you are finished, click **OK** to return to the FIMS viewer.
  9. Select **Send Message / Via E-Mail**. The recipient list, subject line, and message body are automatically added to a new e-mail message in your default e-mail application.

**Important:** If you receive a message requesting access to Outlook, select the **Allow Access For** checkbox and click **Yes**. If you do not select this checkbox and click **Yes**, then you will have to confirm every single e-mail address before the message will be generated. If you click **No**, the process will close without creating an e-mail message.

### Outlook Message



### Example: E-mail Message with Recipients



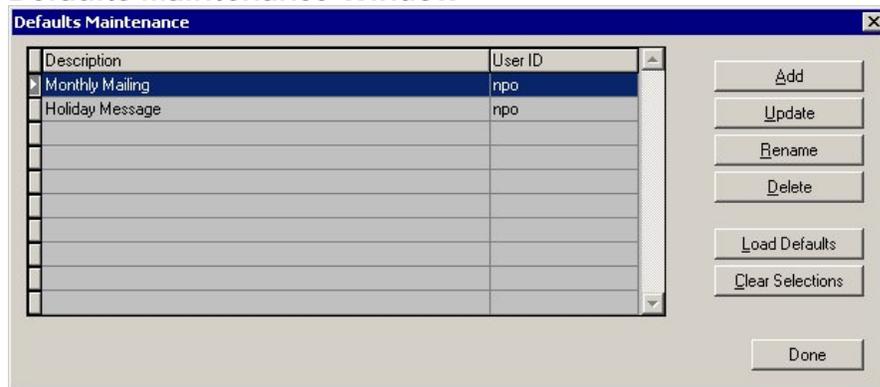
### User Tip: Saving Message Defaults

If you have any standard e-mail messages that you send on a regular basis, you can click the **Defaults** button in the **Send Message**

**Options** window and save your message settings. When you run the report again, you can load the defaults instead of typing in the information again.

1. In the **Send Message Options** window, configure the desired settings (including the Subject and Message fields), and click the **Defaults** button. The **Defaults Maintenance** window opens.

#### *Defaults Maintenance Window*



2. Click the **Add** button. The **Saved Defaults Description** window opens.

#### *Saved Defaults Description Window*



3. Enter a brief text description of the default settings, and then click **OK**.
4. Click the **Update** button to pull the current settings into the new default record.
5. When you are finished, click **Done**.

The next time you run the Address Listing to send an e-mail, click the **Defaults** button in the **Send Message Options** window, select the desired default, and click **Load Selection**.

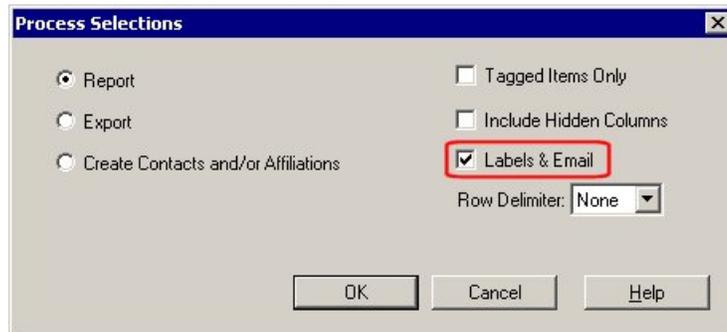
## Data Grid Report: Labels & Email option

**Note:** Emails will only be created for the Profiles shown in your data grid that have an Email Address on the Profile 1 tab (and/or Profile 2 tab if you choose the Spouse Email as well in the options).

**Note:** You do not have to have the Email field in the data grid view to do this but it is recommended to make sure everyone you are emailing does have an email address.

1. Run a report from the data grid, making sure to select the **Labels and Email** checkbox in the **Process Selections** window.

*Labels and Email Checkbox*



2. In the FIMS Viewer, select **Send Message / Options**. The **Send Message Options** window opens.

*Send Message Options Window*



3. Select any of the following options:
  1. If you want to hide the list of recipients when you send the e-mail (blind carbon copy), select the **Hide Recipient Email Address List** checkbox.

**Note:** You should select this option if you want to protect the privacy of the e-mail recipients, or if the list of e-mail addresses is very large.

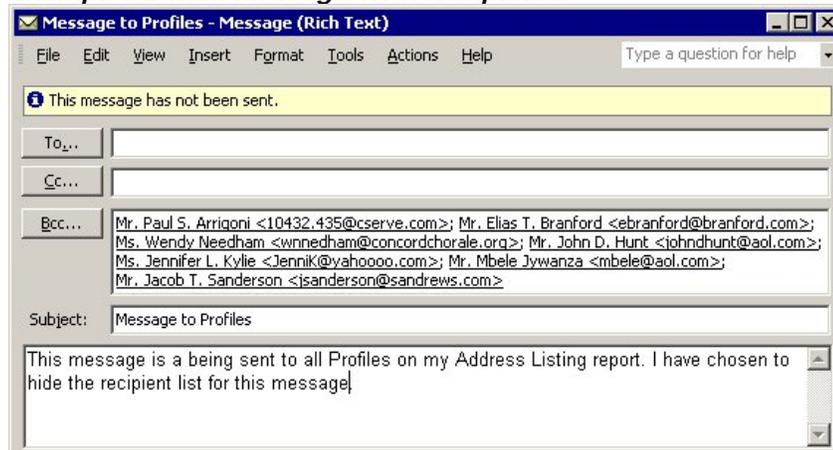
2. If you want to send the e-mail to both the Profile and their spouse, select the **Include Spouse Email Address** checkbox.
3. If you only want to send the e-mail to spouses and not to the main Profile, select the **Spouse Email Only** checkbox.
4. (Optional) In the **Subject** field, enter the subject line for your message.
5. (Optional) In the **Message** field, enter the body of your message.
6. (Optional) If this is a message that you send on a regular basis, click the **Defaults** button and save the message settings for future use.
7. When you are finished, click **OK** to return to the FIMS viewer.
8. Select **Send Message / Via E-Mail**. The recipient list, subject line, and message body are automatically added to a new e-mail message in your default e-mail application.

**Important:** If you receive a message requesting access to Outlook, select the **Allow Access For** checkbox and click **Yes**. If you do not select this checkbox and click **Yes**, then you will have to confirm every single e-mail address before the message will be generated. If you click **No**, the process will close without creating an e-mail message.

#### Outlook Message



#### Example: E-mail Message with Recipients



## Another Option to Send Email from Data Grids

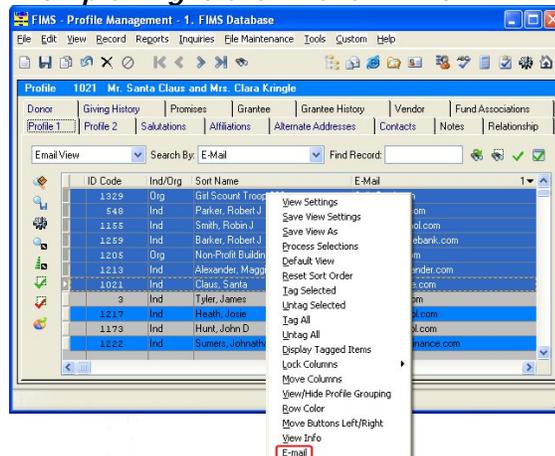
In addition to the ability to use Process Selections to run a report that allows you to generate a mass email, you can now send email to one or more Profiles to the specific email addresses you've set up as columns in the data grid.

**Note:** To use this feature, you must have email field(s) in your data grid.

**Note:** This process allows you to use any email address field that you add to the data grid (not just the main email address for the Profile). For example, you can include email addresses from Profile 1 tab, Profile 2 tab (spouse), Alternate Addresses, Contact Persons, and Application Contacts and Payees (even if they do not have Profile records).

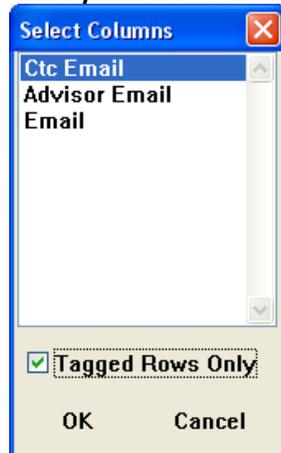
1. Configure your data grid to include the Email Address field as a column.
2. If desired, select and tag the desired record(s) in the Data Grid.
  - To select multiple, contiguous records, hold down the **Shift** key on your keyboard and select the first and last record you want to include.
  - To select multiple non-contiguous records, hold down the **Ctrl** key on your keyboard and select all of the desired records.
  - If you make no selections, the system will send email to all records in the data grid that have an email address.
3. Do one of the following:
  - Right-click and select **Email**.

### Example: Right-click Menu – Email



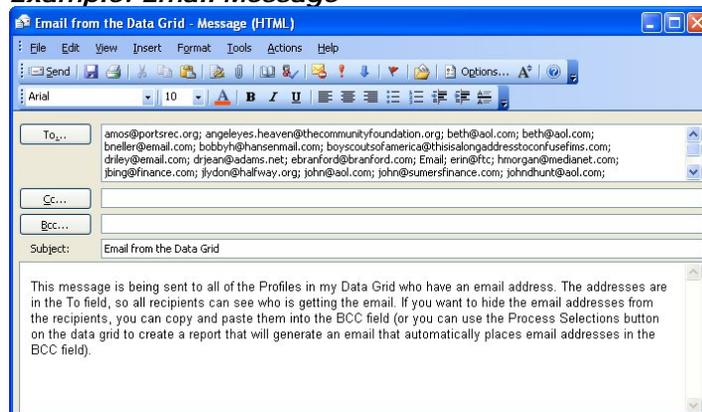
**Note:** If there is more than one Email column in the data grid, FIMS will give you the option to select the appropriate column.

### Example: Select Emails



- Select the **Email** field(s) you want to send an email to.
- (Optional) If you have tagged records to send the email to, select Tagged Rows Only.
- Click OK.
- FIMS opens your email program and automatically inserts the email addresses for all of the selected records into the **To** field.
- Compose and send your email.

### Example: Email Message



## Mass Emailing in FIMS for Host\*Net Users

Launching emails from Host\*Net FIMS does not use your local Outlook program. It is launching Outlook on the Host\*Net server. Therefore, emails sent in this way will not appear in your local Outlook "Sent" folder. **Note:** No one else can see or lookup data in Outlook on the Host\*Net servers. The data is secure and private.

**User Tip:** It is a good idea for you to put your own personal email address on the "CC" or "BCC" line in any emails that are launched from FIMS. That way you will receive a copy of it which you can move to your own personal "Sent" folder. If you want to send emails from your local Outlook instead,

you can export the email addresses from FIMS and do a mass email merge in your local MS Word program.

Each user for Host\*Net FIMS is set up to be able to launch emails from FIMS. When an email is sent, the "From" will appear as the name of the person who sent it. Replies (as well as undeliverable or "out of office" messages) to emails sent through Host\*Net FIMS will come into the personal email box of the person who sent it.

Whenever a new staff person comes on board at your organization, contact FIMS Support so we can get a user name and password set up. At that time, they will be set up so they can email from Host\*Net FIMS.