

# User Guide

## Agoria Group E-mail and Labels



### 1. Selection

#### 1.1 Access to Group Mailing

The group mailing facility module (Mailing - groupMailing) can be added to any of the menus in an Agoria web site using the menu management facility under the Management tab.

To use this facility you must be logged on with the permission of Group Manager.

#### 1.2 Step 1 - How to enter message, criteria and email/labels selection

Agoria group email communications services are designed to enable the user to create and send large volumes of e-mail to the members of the group. The same tool can be used to create Avery name and address labels using the same data selection criteria.

The first screen of the Group Email System consists of three sections.

The first section has the sender, additional recipients and email subject fields plus the Agoria page/module function inclusion facility:

#### Group Mailing: Message And Recipient Selection

Sender and Recipient Options

From:  "Reply To" email address

Bcc:

Additional email addresses separated by commas

Subject:

Add Page:

Add Function:

The options in this section are as indicated below:

From:	Select one of your email addresses as the "reply to" address
Bcc:	Additional email addresses sent to as "Blind Carbon Copy"
Subject:	The subject header for the email ( <b>must be entered</b> )
Add Page:	Option to select a page from the Content Pages module
Add Function:	Option to select the output from a module function to include
Refresh Button	Append the Content Page/module output to the email body

Note: The only module functions permitted to include their output into an email body are the following:

- Event Bulletin
- Event Summary
- Membership List

It is possible to add as many content pages or module function outputs into a message body as you wish. Each time the "Refresh" button is clicked, the output from the selected content page or module function is appended to the end of the message body in the message window below.

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### How to set a content page so it can be included in an email

In order to be able to add a content page to an email, the “Include Scope” of the content page must be set to “Web Site and Emails”. This permits the content of the page to be used as a standard web page and also be selected for copying into an email. **This means that any existing content page on your web site could be included in an email if its “Include Scope” is set to allow it.**

Page Content | News Item Options | RSS and News Feed Options | Image Slider | General Options

**PAGE OPTIONS**

Page Name:

Page Description:

Page Status:  Live  Archive

### IMPORTANT NOTE:

The “**Add Page**” and “**Add Function**” options in group mailing must be enabled for your web site by the system management, if such facilities are required.

**Pages that include image sliders or social media content may not render properly in an email and may also cause a message to be excessively large.**

### The Message Editor Box

The second section of the Group Email facility contains the message editor.

Message and Attachment

Source | B | I | T | Background color | Bulleted list | Numbered list | Link | Unlink | Image | Undo | Redo | Print | Mail

Style | Format | Font | Size

**WEDNESDAY**  
Walking the Way To Health...various venues (public event)  
Time: 6.50 pm every Wednesday  
Do you go to work during the day and become a couch potato in the evenings? Would you like to improve your fitness, lose a little weight, sleep better or just want an alternative to going to the gym? Do you want to get out and meet new people? Why not join others wanting the same benefits on a brisk evening walk that lasts about an hour & a half. The walks start at 7.00 pm from locations in Basingstoke on a rota basis- just turn up at 6.50 pm (there is no charge). See the main diary for details of the meeting point each week.  
Further Details: [www.basingstokehealthwalks.org](http://www.basingstokehealthwalks.org)

**On-Line Bulletin**

**Events Bulletin from 16 October 2012**

**EVENT HIGHLIGHTS**  
In the table below you will find a list of event highlights that are worth an early mention. This is because they are either weekends

**Attachment:**  
Choose File No file chosen

This system may only be used to send an attachment of one of the following file types:  
Text: .htm, .html, .plain, .rtf, .txt  
Image: .gif, .jpeg, .jpg, .png, .bmp  
Application: MS Word (.doc), MS Excel (.xls), MS Powerpoint (.ppt), Acrobat (.pdf), .zip

The message editor provides some simple formatting options for your message plus the option to attach a file.

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The final section of the Group Email facility contains the data selection and message delivery options. The final section is a tab panel which contains the following tabs:

<b>Member Selection</b>	This tab allows the user to enter the member selection criteria to be used. Only members matching the selection criteria in this panel will receive the email. <b>NOTE:</b> The "From Renewal" date will default to the current date so that overdue members are not included. Remove this date if you want all members, including those that are overdue, to receive the email.
<b>Text Search</b>	This panel allows you to enter any text search criteria to use such as members number, keywords and search text. It also provides the option to select certain email criteria.
<b>Delivery Options</b>	This panel selects whether this is to be a labels/csv output or email message. It also allows selection of the message format as a web page or plain text.
<b>Management Options</b>	This panel allows you to select which group management roles are to receive copies of the message.

The following image shows the content of the "Member Selection" tab.

Member Selection
Text Search
Delivery Options
Management Options

**Member Selection**

Fee Category: \* (All Fee Categories)

- Business and Shopping
- Community, Leisure & Environment
- Housing and the Built Environment
- Keep Informed
- Public
- RBWM Council Members

Permission: \* (All Permissions)

- Public
- Guest
- Temporary Member
- Full Member
- Group Officer
- Group Manager

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Payment Method: \* (All Pay Methods)

- AUTHORIZE.NET
- CASH
- CHEQUE
- CR REPEAT
- CR. CARD
- CR. NOTE

(For Subscriptions)

Member Type:  All  Personal  Corporate

Member Status:  Live  Archived  Pending

Gender:  All  Male  Female

Mailing Label:  (Print Label = Y)

Select Family:  (Primary Family Member Only)

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**Date Selection**

Dates must be entered in Euro Format as DD/Mmm/YYYY - e.g. 21/Jan/2000

From Enquiry:

From Join Date:

From Renewal:

From Birthday: D M ANY

To Enquiry:

To Join Date:

To Renewal:

To Birthday: D M ANY

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The process may be more complicated because members can be selected by their Fee Categories, Member Types, Permissions, Post Area, Payment Method, Gender and Renewal Date. **Use blank "From Renewal" Date to send to every active member or where there is no renewal date.**

<b>Fee Categories</b>	All members in your group have fee categories. The system is set up with a few basic ones. You can have 36 different fee categories (0-9 and A-Z). These could be for example, a Member who pays the full annual fee or Family that receives a concession, OAP's Students etc.
<b>Member type</b>	Member type offers you a selection of Personal or Corporate types of members
<b>Permissions</b>	These are the security Access Permissions of the user
<b>Payment Method</b>	Cheques, cash, card or others as required
<b>Gender</b>	All, Male, Female or Undefined

### Dates

<b>Enquiry</b>	In all of these cases there is a <b>from</b> and <b>to</b> date
<b>Join</b>	
<b>From Renewal</b>	The "From Renewal" date will initially have the current date so that only current members are included. Set the "From Renewal" field to blank if you also want to include those members whose renewal is overdue or not required.
<b>To Renewal</b>	If the "To Renewal" if set to yesterday's date, then only members who failed to renew their membership as of yesterday will be included.

The following image shows the content of the "**Text Search**" tab.

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Member Selection Text Search **Delivery Options** Management Options

**Text Search Options**

Member Number:   Blank Membership Numbers Only  
(Search in the Name ID and Membership Number for this text)

**Keyword and name and address Search Options**

Keywords:   Blank Keywords Only  
(Search in the keywords for this text)

Search Text:   
(Search in the name and address fields for this text)

**Search Notes:** When searching for an individual by name enter EITHER surname or first name for the search text. The search is not case sensitive and members with any match for the text in the name or address will be found. For example a search text entry of 'Lyn' will find Lyn, Lynne and Glyn but not Linford.

Checking a "Blank" checkbox, will select those members WITHOUT the respective entry (i.e. keywords and membership numbers). Membership numbers can be searched in part using the \* wildcard. For example 870\* will search for all membership numbers beginning with 870.

**Email Search Options**

Email Options: \* (All - With and Without Email Addresses) ▼

Email Address:   
(All records with this email address)

The following image shows the content of the “**Delivery Options**” tab.

Member Selection Text Search **Delivery Options** Management Options

**Delivery Options**

Deliver By:  EMAIL (plus mailing labels)  
 POST (Mailing labels and/or CSV File)

Message Format:  Web Format (Web page format allowed)  
 Plain Text (Remove web page formatting)

A copy of your message will be sent to you for every 100 emails posted. This will be your confirmation that the message has been sent out.

The following image shows the content of the “**Management Options**” tab.

Member Selection Text Search Delivery Options **Management Options**

**Management Recipients**

Mgt Position:  ▼ In what capacity are you sending this message?  
If you have more than one management position, please select one of them from above. The selection will appear by your name at the end of your message.

Copy to:  All Management Positions  Liaison Officer  
 Chairman  Membership Officer  
 Contact and Enquiries  President  
 Hon. Secretary  Publicity Officer  
 Hon. Treasurer  Web Master

The last two selection blocks relate to whether you want to send the mail to everyone in the group or only those members with defined roles in the group such as Chairman or Committee Members, Membership Secretary etc.

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The last block allows for selection of specific management positions. If you need management positions in your group, then e-mail [support@activityforum.co.uk](mailto:support@activityforum.co.uk) with the details of your requirements.

### 1.3 Step 2 – Sending the message

Once you have completed the message and selection screen click the **continue** button and the following page will appear.

#### Group Mailing: Recipients Processing

Additional Recipients (including sender):  
1. bob@objectiveinternet.com - added to list

Recipients Processing

The system is preparing your mailing, please wait!

Ready to Send Mailing

32 recipients in this mailing

PROCESSING RECIPIENTS  
BHHVIC - The Social Group for North Hampshire  
32 Recipients Processed

Finished Recipient Processing  
33 Recipients Processed (including sender)

Display the Recipients Report - Show Report

Debugging Information  
ColdFusion Server Developer 8.0.1.195765

Message Ready

Once the box above has finished processing, click the "send" button to deliver your message!

Cancel Continue

This details the number of records processed and the option of showing a report of this selection. Don't worry if you don't print the report, it is saved for you and will be available to print later.

Once you are happy with everything, click **Continue**.

#### JOB DONE

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## 2. Reports

### 2.1 Access to Mailing Log in Agoria

The group mail Log facility link can be added to any of the menus in an Agoria web site using the menu management facility under the Management tab.

To use this facility you must be logged on with the permission of Group Manager.

### 2.2 Mail Log Function

Below is the **mail Log** module output showing ALL mail that has been processed by the Agoria and ActivityForum mailing systems.

#### Mail Log

Search Text:  Sent From Date:

No. of Messages:  20  40  60  All

Date	Subject	Mail Reports
Sun 7 Oct 2012	test email - do not reply	<input type="button" value="Mail Report"/>
Sun 7 Oct 2012	test	<input type="button" value="Mail Report"/>
Sat 6 Oct 2012	Test Message	<input type="button" value="Mail Report"/>
Sat 6 Oct 2012	Test Message	<input type="button" value="Mail Report"/>
Sat 6 Oct 2012	Test Message	<input type="button" value="Mail Report"/>
Mon 1 Oct 2012	test	<input type="button" value="Mail Report"/>
Mon 1 Oct 2012	test	<input type="button" value="Mail Report"/>
Mon 1 Oct 2012	test	<input type="button" value="Mail Report"/>
Mon 1 Oct 2012	Test mail	<input type="button" value="Mail Report"/>
Mon 1 Oct 2012	test mail	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	Test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test	<input type="button" value="Mail Report"/>
Sun 30 Sep 2012	test email	<input type="button" value="Mail Report"/>

Above is the **mail Log** module output showing ALL mail that has been sent.

The Mail Log shows the date sent, the method (e-mail or Post) and a button to the mail report. To view a particular message in this report, click on the "Mail Report" button on the right. You will then see a report of that mail message.

The Mail Report button will open a display window showing the content of the email followed by a list of all the recipient email addresses.

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### 2.3 Verifying that a message was sent to a member in ActivityForum

The first step in checking whether someone should have received an email message or postal communication is to check the member details in **ActivityForum**.

**This feature is not available in Agoria.**

If someone says they have not received an e-mail, then check they have a valid e-mail address in their record. For letters, the same sort of validation check should be applied to the postal address.

Also check they have not turned off the label printing.

As a group manager you can go to their member record and look at the mail received as indicated in the diagram below.

ActivityForum > SLO

Member Details: Gr

Enquiry Date:	30/
Prospective:	30/
Join Date:	30/
Renewal Date:	30/
Membership No.:	

Title:	Dr
First Name:	Gra
Last Name:	Bar
Qualifications:	
Label Name:	Dr
Home Phone:	017
Work Phone:	017
Mobile Phone:	
Fax:	

Member List

- Member Details
- Mail Preferences
- Security Settings
- Payments List
- Management Positions
- All Memberships
- Join To Group
- Events Organised
- Events Booked
- Mail Received
- Mail Sent

Fee Categories

Add Member

Mailing Labels/csv file

Group Mailing

Transfer Positions

Gift Aid List

Gift Aid Claim

Click on the “Mail Received” menu option for a report of the email sent to this member and any mailing labels generated for them.



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### 2.4 Report of labels and emails for a member in ActivityForum

You will then see this page displayed with all the mail this member has received. If the email or post record is not listed, then check the date and period on top left of the display to make sure you are looking at records for the correct period.

The options in the “for” drop down are:

- 1 Week - One week from the selected date
- 1 Month - One month from the selected date
- 3 Months - Three months from the selected date
- 1 Year - One year from the selected date
- All - All records from the selected date

Click on the magnifying glass icon to view the content of the message.

Below is an image showing the display of mail received by a member:

Mail Inbox: [Alfred About](#)

Membership Details			
<b>Renewal Due</b>			
Fee Category	Full Member	Permission	Full Member
Member Type	Personal	Page Editor	Yes
		Resource Manager	Yes
Membership Number		Member Status	Live
Participant ID		Membership Duration	

Click on a column header to sort

Mail Inbox					
Display:	20	Messages per page	Show Messages from:	17/Jul/2012	for: All
Displaying 1-17 of 17					
From	Subject	Mail Date	Sent By	Attachment	View
Mr Bob Hartmann	Test mailing timeout	08/Oct/2012	Email		
Mr Bob Hartmann	Test Message	08/Oct/2012	Email		
Mr Bob Hartmann	Test Message	08/Oct/2012	Email		
Mr Bob Hartmann	Test Message	08/Oct/2012	Email		
Mr Bob Hartmann	test email - do not reply	07/Oct/2012	Email		
Mr Bob Hartmann	Mailing test	03/Sep/2012	Email		
Mr Bob Hartmann	Test mailing	31/Aug/2012	Email		
Mr Bob Hartmann	Test mailing timeout	23/Aug/2012	Email		
Mr Bob Hartmann	Test labels	23/Aug/2012	Email		
Mr Bob Hartmann	Testing mailing labels	23/Aug/2012	Email		

Similarly, below is an image showing all the mail sent by the member (if any).

Mail Outbox: [Alfred About](#)

Membership Details			
<b>Renewal Due</b>			
Fee Category	Full Member	Permission	Full Member
Member Type	Personal	Page Editor	Yes
		Resource Manager	Yes
Membership Number		Member Status	Live
Participant ID		Membership Duration	

Click on a column header to sort

Mail Outbox					
Display:	20	Messages per page	Show Messages from:	17/Jul/2012	for: All
No records found.					
From	Subject	Mail Date	Sent By	Attachment	View
There are no Messages which match your search parameters					

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### 3. Events Mailing

If you have an event, you have other options for mailing the event details to members and friends. First display the event details and then select the “Tell A Friend” tab. The basic features of this tab are explained below:

Fields marked with a ■ are mandatory

Sender Name: Bob Hartmann

Sender Email: bob@objectiveinternet.com ■ (Reply to email address)

Copy To Sender:  My email

Send To Attendees:  Yes  Maybe  Wait List (Booking status for attendees)

Send To Group:  Sender  Current Members  All Members (current & overdue)  Everyone  
(Send To Group options are ignored when Send To Attendees boxes are checked)

To Email Addresses:

Enter destination email addresses separated by the semi-colon (;) character

Subject: Weekend in Norwich

Send

**Sender Name:** If you are logged in, this will have your name  
**Sender Email:** If you are logged in, this will have your preferred email  
**Copy To Sender:** This check box is always ticked by default  
**To Email Addresses:** Blind Carbon Copy (additional) email addresses  
**Subject:** The subject for the message initially shows the event title

The **message editor** window provides some simple formatting options for you an additional personal message to be included with the event details.

If you have **Group Manager** Permissions, then the following recipient selection options are also made available to you.

**Send To Attendees:** This allows you to send only to event attendees depending on their booking status. The “Send To Attendees” options will only be displayed if there are people booked onto an event. It will also only show those booking status values recorded against the event.

**Send To Group:** Send to you, current members (exclude overdue members), all members (include overdue members) or everyone in the group