MEMBER BUSINESS SOLUTIONS

FEEDING AMERICA

Mass Emails to Agencies and Shoppers

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Purpose of this document

This document illustrates the step-by-step process of using the Ceres Mass Email functionality to send emails to Parent Agencies, Agencies or Shoppers.

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Purpose

In Ceres, the user can send out mass emails to ALL or filtered groups of

Parent Agency Contacts
Agency Contacts
Shopper email addresses

The user can type one subject, email body and attach documents to be sent with the email. Mass email is very useful if you want to send out information to a large group of constituents at once, for example announcing an unexpected closure or providing information to a selected Order Group.

The same email "body" and attachments are sent to ALL selected entities with an email address in the system. It does not function like a mail merge.

Agency and Donor Document Email Functionality and Agency Express 3 (AE3) email notifications for Shoppers are also available for generating certain types of emails with Document Attachments for Agencies and Shoppers. See Related Documents Section.

Ceres Object release 4.50.00 is required for the functionality described in this document

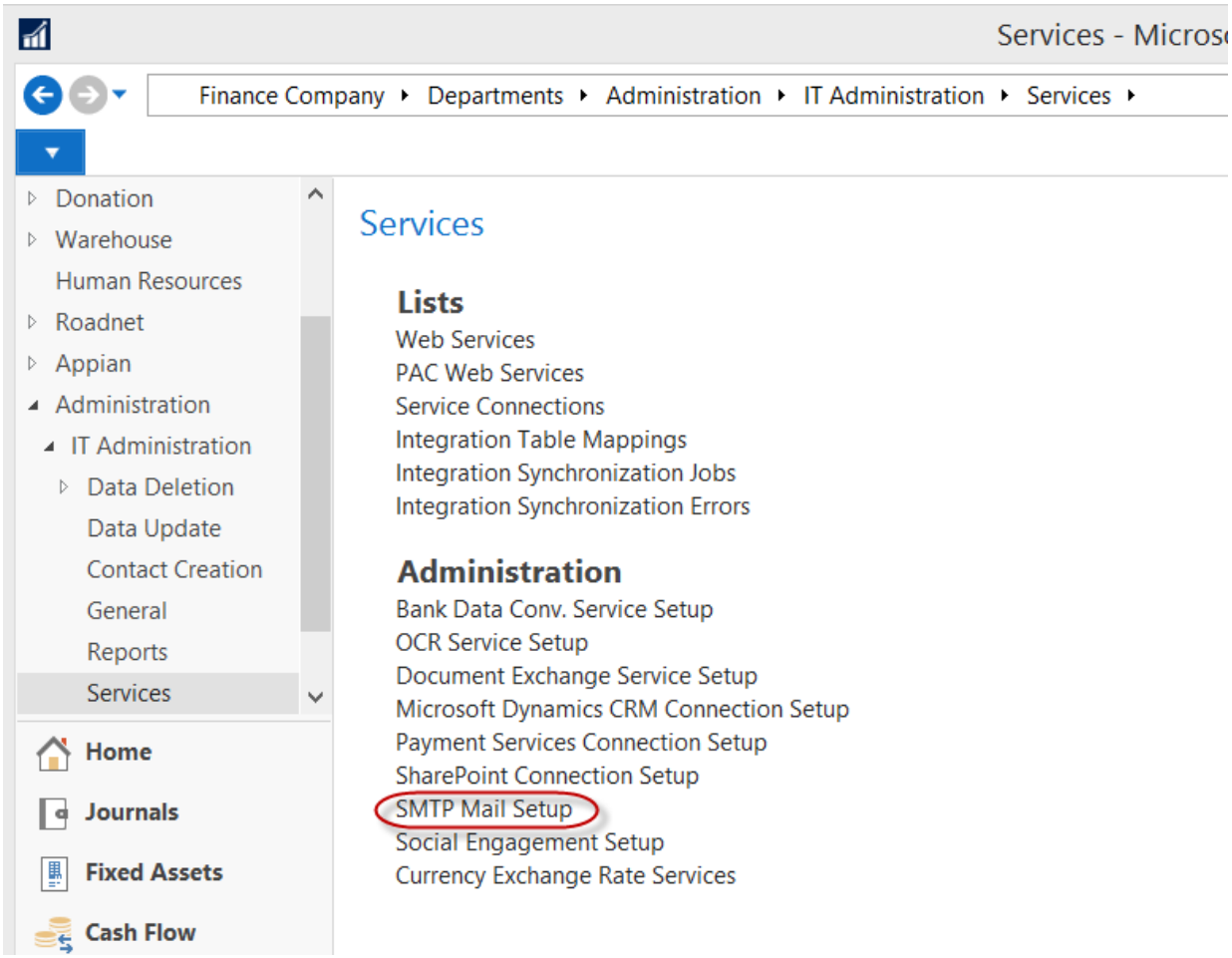
Setting up Mass Email functionality

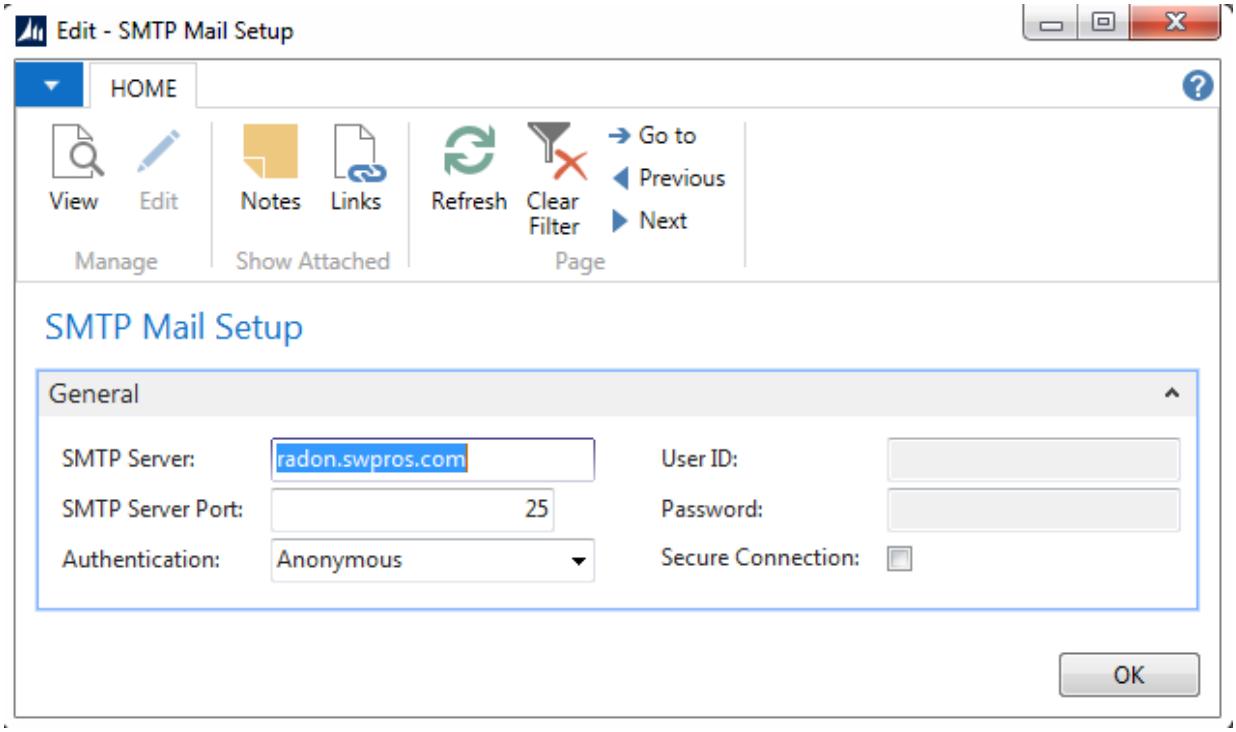
In addition to the SMTP mail setup defined here, you may need to work with your Exchange Administrator to allow emails to large numbers of recipients to be processed. Otherwise it may be flagged as junk mail or quarantined by the server. In addition, if you manage your own Ceres server and Exchange Server, you may need to install and register a mail handling DLL to allow emails to bypass the local Outlook client. The AE3 Shopper email and Donor/ Agency Email referenced above has similar setup requirements. If you are hosted, talk to the Service Desk about this setup.

SMTP Setup for Mass Email

1. In order to be able to send mass emails from within Ceres to your email system, you must set up the SMTP (Simple Mail Transfer Protocol). Please note that this is similar, but different than the email protocol set up for sending automatic email messages to Shoppers for Agency Express.

2. This setup for Mass emails can be accessed from Departments →Administration →IT Administration →Services →Administration →SMTP Mail Setup


Services - Microso
Finance Company ▸ Departments ▸ Administration ▸ IT Administration ▸ Services ▸
Donation
Warehouse
Human Resources
Roadnet
Appian
Administration
IT Administration
Data Deletion
Data Update
Contact Creation
General
Reports
Services
Home
Journals
Fixed Assets
Cash Flow
Services
Lists
Web Services
PAC Web Services
Service Connections
Integration Table Mappings
Integration Synchronization Jobs
Integration Synchronization Errors
Administration
Bank Data Conv. Service Setup
OCR Service Setup
Document Exchange Service Setup
Microsoft Dynamics CRM Connection Setup
Payment Services Connection Setup
SharePoint Connection Setup
SMTP Mail Setup
Social Engagement Setup
Currency Exchange Rate Services



3. Specify the STMP Server settings applicable for your food bank as well as the Authentication preference, and an Administrator User ID and Password if required. Typically your IT person or department will handle this setup. If you are a FA Hosted site, you can log a Service Desk ticket for this assistance.

Email Address Setup

The Mass email routine will send to all selected Parent Agencies, Agencies and Shoppers that *have a valid email address* in the following fields:

Parent Agency
Field titled "E-mail" on the Communication Tab, which typically matches the Contact Name from the General Tab

Agency
Field titled "E-mail" on the Communication Tab, which typically matches the Contact Name from the General Tab. Please note – this routine does not send to the Invoice Email or Statement Email.

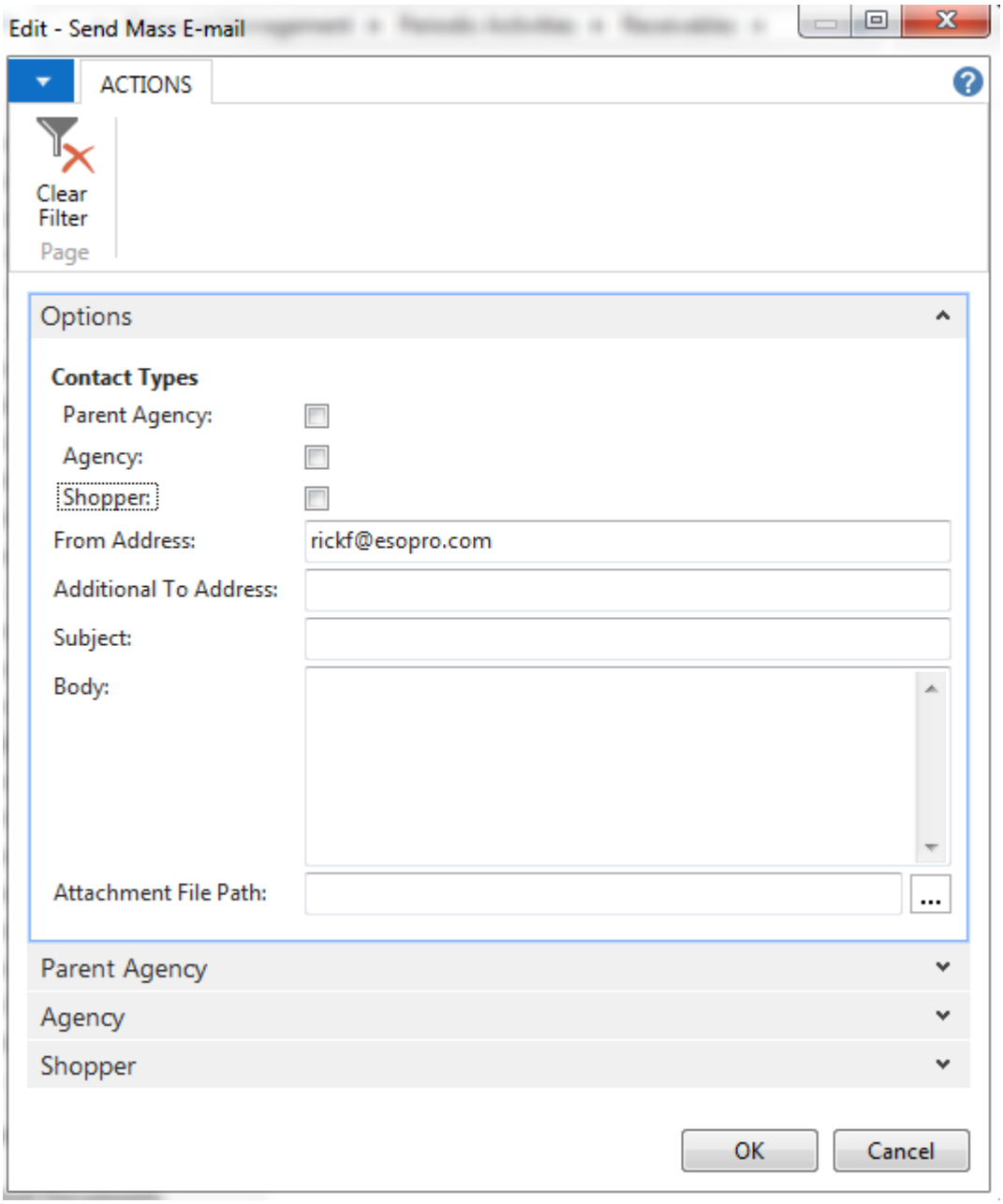
Shopper
Field titled "E-mail Address" on the Shopper record.

If any of these fields contain values other than an email address, the Mass email function may fail. Validate your email information before using this for the first time.

Sending Mass Emails

When you send the emails out, an Agencies email provider may trap it in Junk/ Spam. You should send a sample email out and ask the Agencies to mark your source address as a trusted sender in their email client.

1. The Mass Email functionality batch routine is located in Financial Management →Periodic Activities →Receivables → Send Mass Email. You can also add it to your Home Page if desired.



2. You can select which Contact Type(s) you want to Email by selecting **Parent Agency, Agency** or **Shopper**. Multiple choices are allowed. Ceres will use the email address that is stored on the

Parent Agency page (main contact), the Agency page (main contact), or the Shopper depending on the selection.

3. The **From Address** is the Reply-to address that will show in the email.

4. **Additional To Addresses**: You can manually enter additional email addresses you want to send this email to. Multiple addresses should be separated by a semicolon.

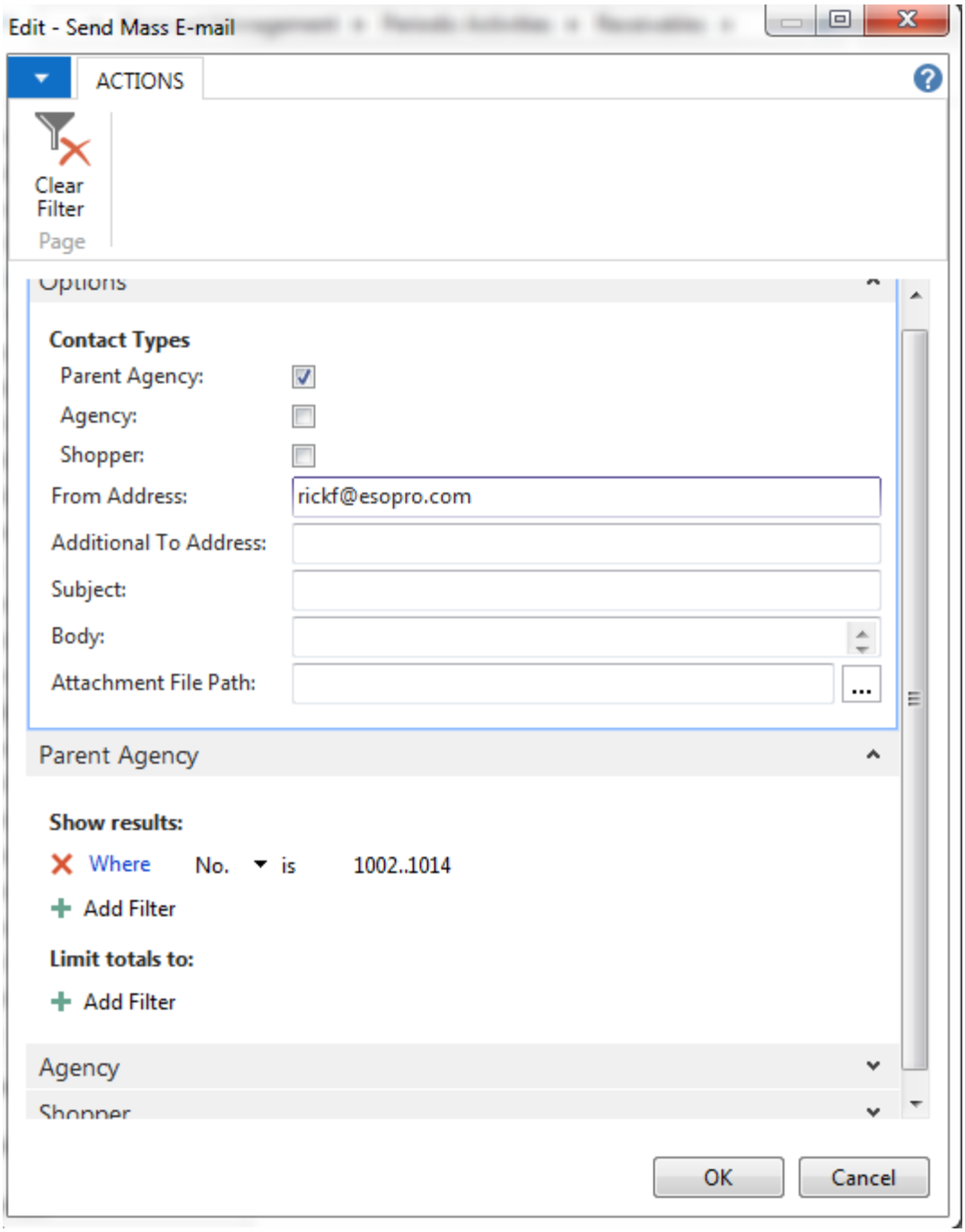
5. **Subject**: Enter the email subject. This can be left blank, but that is not recommended or your message may be trapped at the server as a risk.

6. **Body**: Enter the body of the email you want to send. Please note that the exact same message is sent to all selected entities (all Shoppers with emails for example)

7. **Attachment File Path**: If you want to include an attachment, browse to the location of the file. The file path will display.

8. If you checked one or more **Contact Types** in step 2, only those with a valid email address defined will be included, but there can be times where you only want to send an email to a *subset* of selected entities. This further winnowing of the email list can be accomplished by setting additional filters.

   In our example, we will select a subset of Parent Agency Contacts. To do so, expand the Parent Agency FastTab at the bottom



In the above example, only Parent Agency Contacts with an email address on the Parent Agency Card in the number range of 1002 to 1014 will receive the email. You can further refine the recipients of the email by adding additional filters as needed. The fields shown on the Parent Agency, Agency and Shopper Cards are available for filtering. Any fields that must be accessed via Related Information are not available for filtering the email groups.

9. You can set the same filter options for both Agency and Shopper by expanding those FastTabs.

10. Once the email is complete and ready to send, click **OK**.

11. A status message will pop up when the emails have been sent to the server.

Related Topics:

Parent Agency Overview
Agency Overview
Agency Profiles
Order Handling Groups and Order Routing Groups
Agency and Donor Document Email Functionality
AE3 Agencies_ Shoppers_ Items
Agency Express Managing Web Orders