



Mass Emails

Purpose of this document

This document illustrates the step-by-step process of using the Ceres Mass Email functionality to send emails to the following entities:

- Parent Agencies
- Agencies
- Shoppers
- Vendors
- Donors
- Contacts

Ceres Object release 5.00.00 is required for the functionality described in this document.

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Overview

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

- Parent Agencies
- Agencies
- Shoppers
- Vendors
- Donors
- Contacts

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.

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).

Note: 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 - Microsoft Dynamics NAV

Finance Company ▶ Departments ▶ Administration ▶ IT Administration ▶ Services ▶

Departments

- ▶ Financial Management
- ▶ Agencies & Receivables
- ▶ Purchasing
- ▶ Donation
- ▶ Warehouse
- Human Resources
- ▶ Roadnet
- ▶ Appian
- ▶ Adv. Leased Storage
- ▲ Administration
 - ▶ IT Administration
 - ▶ Data Deletion
 - Data Update
 - Contact Creation
 - General
 - Reports
 - Services**
 - Extensions
 - ▶ Application Setup

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 365 for Agency Connection Setup
- SharePoint Connection Setup
- SMTP Mail Setup**
- Social Engagement Setup
- Currency Exchange Rate Services
- Payment Services
- Office Add-in Management
- API Setup
- Exchange Sync. Setup

Edit - SMTP Mail Setup

HOME ACTIONS

Manage **Process** **Show Attached** **Page**

SMTP Mail Setup

General

SMTP Server: User ID:

SMTP Server Port: Password:

Authentication: Secure Connection: ☒

OK

3. Specify the SMTP 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 Address & Contact Tab, which typically matches the Contact Name from the General Tab

Agency

Field titled "E-mail" on the Address & Contact Tab, which typically matches the Contact Name from the General Tab.

Note: This routine does not send to the Invoice Email or Statement Email.

Shopper

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

Donor

Field titled "E-mail" on the Address & Contact Tab, which typically matches the Contact Name from the General Tab.

Note: This routine does not send to the Receipt Delivery Email.

Vendor

Field titled "E-mail" on the Address & Contact Tab, which typically matches the Contact Name from the General Tab.

Contact

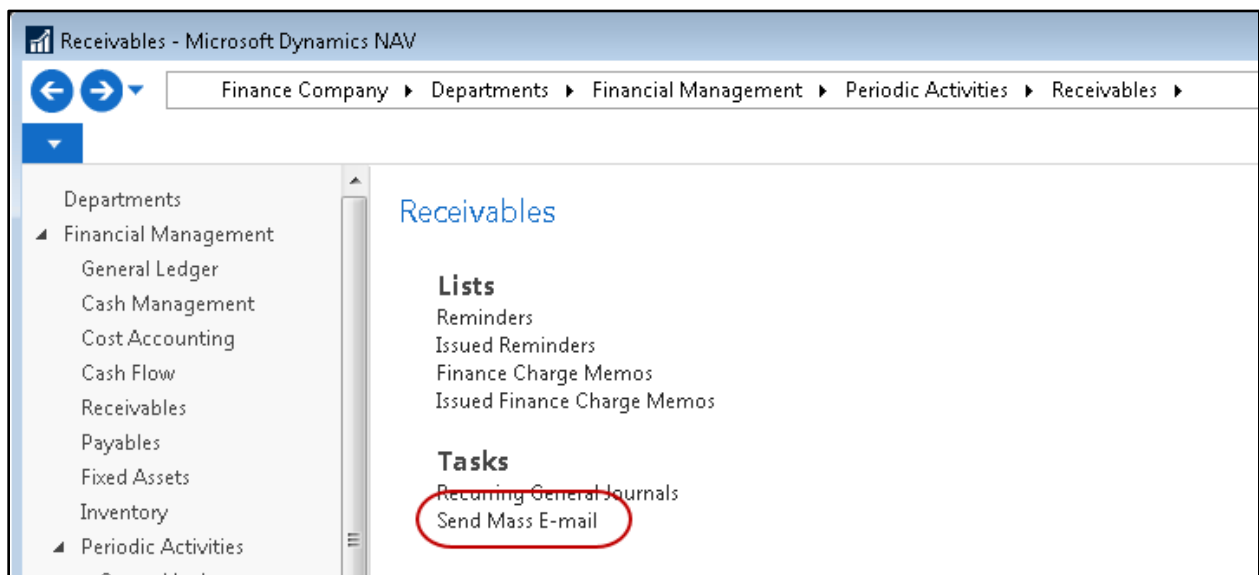
Field titled "E-mail" on the Communication Tab, which typically matches the Contact Name from the General Tab.

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.



Edit - Send Mass E-mail

ACTIONS Ceres 5.0 Testing ?

 Clear Filter Page

Options ^

Contact Types

Parent Agency: ☐

Agency: ☐

Shopper: ☐

Vendor: ☐

Donor: ☐

Contact: ☐

From Address:

Additional To Address:

Subject:

Body:

Attachment File Path: ...

Parent Agency ▾

Agency ▾

Shopper ▾

Vendor ▾

Donor ▾

Contact ▾

Schedule... OK Cancel

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


Note: 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

Edit - Send Mass E-mail


ACTIONS Ceres 5.0 Testing ?




 Clear Filter
Page


Parent Agency: ☒
 Agency: ☐
 Shopper: ☐
 Vendor: ☐
 Donor: ☐
 Contact: ☐

From Address: davidc@esopro.com
 Additional To Address:
 Subject:
 Body:
 Attachment File Path: ...

Parent Agency

Sorting: No. 

Show results:
 Where No.  is 1002..1014
 Add Filter

Limit totals to:
 Add Filter

Schedule... OK Cancel

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, Shopper, Donor, Vendor and Contact Cards are available for filtering. Any fields that must be accessed via Navigate functions 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

1. Parent Agency Overview
2. Agency Overview
3. Agency Profiles
4. Order Handling Groups and Order Routing Groups
5. Agency and Donor Document Email Functionality
6. AE3 Agencies_ Shoppers_ Items
7. Agency Express Managing Web Orders